Real Estate Data Sheet  
(To be completed by the Assistant Vice President of Individual Giving and Estate Gift Planning)

Prospective Donor: ______________________________________________________

Location of Property: ______________________________________________________

Type of Property (personal residence, commercial, etc.): ____________________________

Proposed Gift Arrangement:  
___ Outright ___ Estate ___ CRT ___ GA ___ RLE ___ Bargain/Sale Other: ______

Proposed Date of Gift: _________________

1. Ownership and Use

___ Title—Donors current ownership interest

___ Number of Years of Ownership (purchased in 2017)

_____ Structures or improvements, type and date of construction, number of floors, number of stories; materials used in construction

______________________________________________________________

_____ Describe previous use of the property

______________________________________________________________

Current Deed:

_____ Warranty Deed

_____ Quitclaim Deed

_____ Sheriff’s Deed

_____ Other (specify) _________________

_____ Copy of Deed in File: _____ yes _____ no

_____ Warranty Deed prepared on behalf of charity: _____ yes _____ no

_____ Current Updated Abstract: _____ yes _____ no

_____ Title Insurance owned by donor: _____ yes _____ no  Copy in file: _____ yes _____ no

_____ New Title Insurance to be purchased by donor: _____ yes _____ no

_____ Survey
Real Estate Data Sheet (Continued)
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2. Environmental Review

_____ Has the property known or suspected to have been used as a dumping site, either legally or illegally, for disposal of solid or chemical waste? _____yes _____no
If yes, please explain:

_________________________________________________________________________________
_________________________________________________________________________________

_____ Any evidence or suspicion of asbestos-containing material or lead paint in the building(s)?
_____yes _____no  If yes, please describe:

_________________________________________________________________________________
_________________________________________________________________________________

_____ Are there any known or suspected above ground or underground storage tanks on or near the property including fuel oil, heating oil or gasoline? _____yes _____no  If yes, please describe, including distance from property:

_________________________________________________________________________________
_________________________________________________________________________________

_____ Are there any other environmental hazards on or near the property?
_________________________________________________________________________________
_________________________________________________________________________________

Types of review to be conducted

_____ Personal inspection by staff: date__________________

_____ Inspection by qualified home inspector: date_________ Copy in file: ___yes ___no

_____ Transaction Screen Questionnaire (has one been conducted by an engineer?)

_____ Pre-Phase I Environmental Review: date_________ Copy in file: ___yes ___no

    Phase I ER: date_________ Copy in file: ___yes ___no

    Phase II ER: date_________ Copy in file: ___yes ___no

    Phase III ER: date_________ Copy in file: ___yes ___no
3. **Cash Flow Analysis**

- Income from rental or lease. $________________
- Current yearly operating expenses
- Property taxes $________________
- Insurance $________________
- Electricity $________________
- Heat $________________
- Condominium/Homeowner Fees $________________
- Road Maintenance $________________
- Other $________________

4. **Marketability**

- Current Qualified Appraisal __yes __no Date__________
  Copy in file: __yes__no

- New Qualified Appraisal to be completed by date: ______________

- Describe recent efforts to dispose of property (e.g., efforts to sell, donate, etc.)
  __________________________________________________________________________
  __________________________________________________________________________
  __________________________________________________________________________

- Name all listing / selling agents used for property within the last two years:
  __________________________________________________________________________
  __________________________________________________________________________

- Any current mortgage, lien, debt, encumbrance, on property:
  __________________________________________________________________________
  __________________________________________________________________________

- Current zoning classification (found on real estate tax bill) / description of property:
  __________________________________________________________________________
  __________________________________________________________________________
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___ Current property use:

___ Rental Property
   # of units____ # of tenants____
   Current Leases____

____ Commercial

____ Private

___ Any known rights-of-way or easements on the property? (Please describe below):

________________________________________________________________________
________________________________________________________________________

___ Proposed Use of the property upon sale or disposition?

________________________________________________________________________
________________________________________________________________________

___ Describe condition of property:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

___ Describe surrounding neighborhood, properties, etc.:

________________________________________________________________________
________________________________________________________________________

___ What is the type of current use and zoning of the property?
   (Does use comply with zoning?)

________________________________________________________________________

___ Are property taxes paid to date: ___yes ___no
   Amount owed: $__________
   Approximate annual property tax bill: $__________

___ Property insurance currently on property: _____yes____no
   Approximate annual coverage amount: $__________