

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)

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

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

Real Estate Data Sheet (Continued)

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

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:

Real Estate Data Sheet (Continued)

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

_____ 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: \$ _____