Real Estate Gift Information Form

Prepared by: _____ Date: _____

Required Attachments:

- ☐ Copy of latest tax bill with assessor's valuation
- ☐ Copy of donor's Insurance Declaration page
- ☐ Copy of Deed granting property to the donor
- ☐ If bequest, copy of Donor's Certificate of Death

Supplemental Attachments:

- ☐ Copy of Trust and/or Partnership Documents
- ☐ Documentation of Property Access (such as an Easement)
- ☐ Copy of Boundary Survey
- ☐ Copies of all existing leases involving the property
- ☐ Condo/Homeowner's association bylaws, financials and latest minutes

Contact Information:

Name(s): _____

Address: _____

City: _____ State: _____ Zip code: _____

Phone: _____ Email Address: _____

Property Description and Condition:

1. Property _____

   Address: _____

   City: _____ State: _____ Zip code: _____

2. Provide a brief description of the property and its general condition, including information on the land, its history, and any building(s) and deferred maintenance:

   _____

3. Do you intend to donate any personal property along with the real estate?

   ☐ Yes ☐ No

   If "yes," please provide a generation description: _____

4. How was the property acquired?

   ☐ Purchase ☐ Inheritance

   ☐ Other *Please explain:* _____

5. Year property was acquired: _____

6. How title is held (i.e. in your individual name, jointly with others, in a revocable trust, LLC, etc.)?

   _____

7. Value of the property when acquired (i.e. purchase amount):

8. How is the property accessed?

   ☐ Private road ☐ Public road ☐ Easement over neighboring property ☐ Informal agreement with neighbor

   ☐ Other *Please explain:* _____

   If applicable, provide documentation of easement or other permission to access. See ***Supplemental Attachments****, page 1.*

9. Do you know of any easements that run across this property?

   ☐ Yes ☐ No

   If "yes," please explain: _____

10. Are there any restrictions on transfer, such as first right of refusal to purchase the property?

☐ Yes ☐ No

If "yes," please explain: _____

11. Are you aware of any of the following items being present on the property. Check all that apply and provide more information below.

☐ Asbestos ☐ Lead paint ☐ Underground oil storage tanks ☐ Hazardous waste ☐ Other

Please explain: _____

Real Estate Taxes

1. Parcel identification number: _____
2. Tax Jurisdiction: _____
3. Account number: _____
4. Zoning: _____
5. Date of last assessment: _____
6. Total annual taxes: _____
7. Total tax assess value: _____

   Land: _____

   Improvements: _____
8. Tax bill schedule: _____
9. Enrollment in any program that results in reduced property taxes (such as an agricultural district or open space program):

_____

Property Valuation and Financing

1. Donor estimate of fair market value and basis for opinion (please indicate if based on appraisal or realtor market analysis): _____

2. Has your property been listed on the open market in the last three years?

   ☐ Yes ☐ No

   If "yes":

   At what price was the property listed: _____ *Were any offers received?* ☐ Yes ☐ No

   Why did a sale not occur? _____

3. Are there any mortgages or liens on the property?

   ☐ Yes ☐ No

   If "yes" approximate amount of mortgage balance: _____

4. List additional insurance carried on the property:

   ☐ Flood ☐ Hazard ☐ Timber ☐ No additional insurance

   ☐ Other *Please explain:* _____

Utilities

1. Are any utilities covered by a Homeowners Association (HOA)?

   ☐ Yes ☐ No

   If "yes" check all that apply:

   ☐ Air Conditioning ☐ Electricity ☐ Gas ☐ Heat

   ☐ Sewer ☐ Water ☐ Trash Removal

2. Sewage system:

   ☐ Public ☐ Septic Field ☐ Cesspool ☐ None

   ☐ Other *Please explain:* _____

   If septic, provide approximate date of last septic inspection/pump: _____

3. Water:

☐ Public ☐ Well ☐ None

☐ Other *Please explain:* _____

4. Approximate age of water/sewer system: _____

5. Heat:

☐ Electric ☐ Heat Pump ☐ Liquid Petroleum Gas ☐ Oil

☐ Natural Gas ☐ Combination ☐ None

☐ Other *Please explain:* _____

6. Air conditioning:

☐ Central ☐ Swamp cooler ☐ Window units ☐ None

☐ Other *Please explain:* _____

7. Gas provider: _____

   Account number: _____

   Connected appliances: _____

8. Water/Sewer provider: _____

   Account number: _____

9. Electric provider: _____

   Account number: _____

   Connected appliances: _____

10. Trash provider: _____

    Account number: _____

11. Approximate age of roof: _____

12. Security system installed?

☐ Yes ☐ No

If yes, who is your provider? _____

TNC Related

1. Do you intend to designate TNC's use of the proceeds (ex: state chapter, global priorities)?

   ☐ Yes ☐ No

   If yes, please explain: _____

2. Is there anything else TNC needs to know about the property in our consideration of accepting the donation (ex: mineral rights, government notices, etc.)?

   _____

Supplement for Income-Producing and Depreciable Property

Complete the section below if the property you would like to donate is an income-producing or depreciable property.

1. Is there a signed lease? ☐ Yes ☐ No *If yes, please provide a copy.* *See **Supplemental Attachments**, page 1.*

2. Lease type:

   ☐ Residential ☐ Commercial ☐ Hunting ☐ Farming ☐ Oil/Gas/Mineral

   ☐ Other *Please explain:* _____

3. Rent amount/frequency: _____

4. Management company/contact: _____

5. Is there a security deposit? ☐ Yes ☐ No

   If yes, please provide security amount: _____

6. Who holds the security deposit? ☐ Property Manager ☐ Property Owner

   ☐ Other *Please explain:* _____

7. Are there other sources of income generated by the property (e.g. coin-operated laundry)?

   ☐ Yes ☐ No *If yes, please explain:*

8. Number and description of tenants: _____