

# Real Property Gift Inquiry Form

## I. OWNERSHIP (full names and addresses of all owners, use additional pages if necessary)

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone (Business) \_\_\_\_\_ (Home) \_\_\_\_\_ (Cell) \_\_\_\_\_

Type of ownership  Sole;  Joint;  General Partnership;  Limited Partnership;  
 Community Property

Does ownership include mineral rights, water rights, and restrictive easements, covenants, etc.?  
\_\_\_\_\_  
\_\_\_\_\_

## II. LOCATION

Street Address \_\_\_\_\_ City \_\_\_\_\_

County \_\_\_\_\_ State, ZIP \_\_\_\_\_

## III. FINANCIAL AND TITLE INFORMATION

How did you acquire this property? \_\_\_\_\_

How long have you owned this property? \_\_\_\_\_

What did you pay for this property? \_\_\_\_\_

Is there an unpaid mortgage  Yes  No

Amount of unpaid mortgage \$ \_\_\_\_\_

Please describe any liens or encumbrances \_\_\_\_\_  
\_\_\_\_\_

Is there any pending litigation with the property? If so please describe \_\_\_\_\_  
\_\_\_\_\_

Are there tenants on the property  Yes  No

Annual rental income \$ \_\_\_\_\_

Amount of annual taxes \$ \_\_\_\_\_ When are taxes due? \_\_\_\_\_

How is the property designated on the tax maps?

Zoning \_\_\_\_\_

Has the property been the subject of any regulatory designations (such as wetlands)? If so, please list type of designation and regulatory agency:  
\_\_\_\_\_  
\_\_\_\_\_

Do you have title insurance?  Yes  No

Name of the title insurance company \_\_\_\_\_

Policy Number \_\_\_\_\_ Please provide a copy of the policy if available

Have any insurance claims been made with regard to the use of this property? If so please describe.  
\_\_\_\_\_  
\_\_\_\_\_

Do you have a recent appraisal  Yes  No

Appraisal date \_\_\_\_\_ Appraised market value \$ \_\_\_\_\_

Please provide a copy of the appraisal.

**IV. DESCRIPTION**

- Residence       Condominium       Commercial
- Vacant Land       Rental       Other

Number of Acres \_\_\_\_\_ Approximate Dimensions \_\_\_\_\_

Boundaries (roads, water, development, etc.) \_\_\_\_\_

\_\_\_\_\_

Natural Features (vegetation, water, geological formations, etc.) \_\_\_\_\_

\_\_\_\_\_

Improvements (buildings, roads, utility easements, etc.) \_\_\_\_\_

\_\_\_\_\_

Wildlife: Please list wildlife which has been identified on the property with emphasis on rare or endangered species.

\_\_\_\_\_

Usage: Please give a brief history of how property was used before and during your ownership.

\_\_\_\_\_

Is the property benefited by any rights of way or easements? \_\_\_\_\_

Please describe \_\_\_\_\_

\_\_\_\_\_

Describe uses on adjacent parcels \_\_\_\_\_

Has an environmental review ever been completed on this property?  Yes  No

If Yes, please provide date. \_\_\_\_\_

**V. DISPOSITION**

Do you intend to transfer ownership of (donate) this property (please circle one) during your lifetime or through your will?  Yes  No

How can charity make arrangements to have a representative visit the property?

\_\_\_\_\_

**VI. SUPPORTING INFORMATION**

Please attach any information that will help evaluate the property, such as:

- topographical map     tax map     aerial photo     soil survey     survey
- latest tax notice