



**GIFT OF REAL PROPERTY  
General Information Form and Questionnaire  
(to be completed by owner)**

Based upon the best of your knowledge, please provide the following information.

<b>Owner(s):</b>
<b>Phone Number(s):</b>
<b>Address:</b>
<b>Email(s):</b>
<b>Property Description</b> (i.e. use, land, buildings/structures):
<b>Date of Acquisition:</b>

<u><i>Value of Property, Liens on Property</i></u>	<u><i>Occupancy Status After Donation</i></u>
Current Fair Market Value _____	<input type="checkbox"/> <b>Vacant Land</b> (no buildings or tenants)
Unpaid Mortgage Balance _____	<input type="checkbox"/> <b>Vacant</b> (building(s) without personal property or occupants/tenants)
Other Unpaid Liens (total) _____	<input type="checkbox"/> <b>Unoccupied</b> (building has personal property but no occupants/tenants)
	<input type="checkbox"/> <b>Occupied</b> (building has personal property with occupants/tenants)

***Anticipated Annual Income Earned From Property***

<b>Income Type</b>	<b>Est. Annual Amt.</b>
Income	\$ _____
Rent/Lease	\$ _____
Other (please describe):	\$ _____

***Anticipated Annual Expenses Incurred By Property***

<b>Expense Type</b>	<b>Est. Annual Amt.</b>	<b>Expense Type</b>	<b>Est. Annual Amt.</b>
Real Estate Taxes	\$ _____	Services	
• 1 <sup>st</sup> pmt due _____		Caretaker/Property Mgr	\$ _____
• 2 <sup>nd</sup> pmt due _____		Landscaping	\$ _____
Utilities		Heating/Cooling	\$ _____
Gas	\$ _____	Snow Removal	\$ _____
Oil	\$ _____	Condo/Assoc. Fees	\$ _____
Electric	\$ _____	Security	\$ _____
Water/Sewer	\$ _____	Other:	\$ _____
Other	\$ _____	_____	\$ _____
Maintenance/Repairs	\$ _____	_____	\$ _____

### Real Estate Questionnaire

Please circle "Y" if you are aware of **any condition or problem** which **may negatively affect** the title to the property or the ability to sell it. Use Page 3 to provide additional information.

Title, Zoning, Liens			Rental, Condominium, Cooperatives		
Y	N	Title	Y	N	Lease(s) on the property
Y	N	Zoning variance, violation, special permit	Y	N	Rental arrears
Y	N	Zoning violations	Y	N	Last month's rent/security deposit
Y	N	Restrictions or easements	Y	N	Common area fees in arrears
Y	N	Deeds of Trust, Mortgages	Y	N	Building or sanitary code violations
Y	N	Liens (tax, mechanics, judgment, etc.)	Y	N	Operating/Capital budget for building
Building – in general			Building – systems		
Y	N	Foundation/Slab	Y	N	Plumbing
Y	N	Basement water, dampness, sump pump	Y	N	Electrical
Y	N	Roof leaks	Y	N	Heating
Y	N	General structural issues	Y	N	Air Conditioning
Y	N	Asbestos	Y	N	Water Supply
Y	N	Lead Paint (paint prior to 1978)	Municipal or Well (circle one)		
Y	N	Termites, ants, pests, or vermin	Y	N	Sewage
			Municipal or Septic (circle one)		
Environmental – History of Property			Environmental – Condition of Property		
Y	N	Property has <i>PRIOR</i> or <i>CURRENT</i> use for industrial, commercial, agricultural, manufacturing, waste disposal or any other non-residential purposes	Y	N	Stressed or denuded vegetation or unusual barren areas
			Y	N	Discoloration, oil sheens, or foul or unusual odors in water
Y	N	Flood plain, wetlands, drainage	Y	N	Storage Drums
Y	N	Endangered plants or wildlife	Y	N	Above or underground storage tanks; vent or filler pipes
Y	N	Reforestation requirements, farm or tax Deferral			
Y	N	Scenic or conservation restrictions	Y	N	Evidence of PCBs
Y	N	Historical/archeological considerations	Y	N	Evidence of toxic air emissions
General Evaluation					
Y	N	Are you aware of any other information concerning any part of the land or buildings that might affect the decision of a willing buyer to purchase the property, affect the property's value, or affect the property's use?			

**Additional information about the property:** \_\_\_\_\_  
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**Requested Documents:**

To expedite the Foundation’s review of your proposed gift, please attach copies of the following documents to this checklist:

- **Deed** – the deed by which you obtained the property, not the deed by which you will donate the property. If the property was inherited, please provide a copy of the Will or other instrument by which you obtained the property.
- **Survey or Plat** – most recent available
- **Leases/Rental Contracts or Agreements** – include all contractual agreements relating to the property
- **Any Other Pertinent Documents**

If these documents are not readily available, please contact the Foundation’s Office of Planned Giving at (406) 994-2053 or (800) 457-1696 to discuss other ways to obtain the information contained in these documents.

**Acknowledgement:**

Owner(s) hereby acknowledge that the information set forth above is true and accurate to the best of my (our) knowledge.

Owner \_\_\_\_\_ Date \_\_\_\_\_

Owner \_\_\_\_\_ Date \_\_\_\_\_