

Date _____

Source _____

PRELIMINARY INFORMATION FORM

OWNER INFORMATION

Name(s) _____ Phone (____) _____

Address _____

PROPERTY INFORMATION

Type of property _____

Address of Location _____

Access Instructions _____

Owner's Interest Full Partial

Free And Clear Encumbered Amount

Owner's Value \$ _____ Source _____

Land Value \$ _____ Improvement Value \$ _____ Age _____

Date Acquired _____ Adjusted Cost Basis \$ _____

Is property listed of been listed recently? Yes No

If yes, name and number of broker _____

Current Property expenses: Taxes \$ _____ Insurance \$ _____

Utilities \$ _____ Maintenance \$ _____ Other \$ _____

If Rented, Gross Income \$ _____ Operating Expense \$ _____

Net Cash Flow \$ _____

Method of Gift

Outright Partial Interest Bargain Sale

Life Estate Trust Annuity Other _____

Birth Date and Sex of Retained Interest Beneficiaries

#1 _____ #2 _____ #3 _____