



REAL ESTATE GIFT QUESTIONNAIRE

First Donor Full Name

Second Donor Full Name *(if applicable)*

REAL ESTATE INFORMATION

Type of property:

- | | | |
|--|--|--|
| <input type="checkbox"/> Raw land of ___ acres | <input type="checkbox"/> Single-family residence | <input type="checkbox"/> Apartment building |
| <input type="checkbox"/> Industrial | <input type="checkbox"/> Warehouse | <input type="checkbox"/> Agricultural/ranch of ___ acres |
| <input type="checkbox"/> Recreational | <input type="checkbox"/> Condominium | <input type="checkbox"/> Commercial |
| <input type="checkbox"/> Other: _____ | | |

How is the title held?

- By a married couple in joint tenancy
- By a married couple as tenants in common
- By an individual
- By individuals as tenants in common
- By individuals in joint tenancy
- By a partnership
- By a trustee
- By a corporation
- Other: _____

What is the street address of this real estate?

What is the property tax identification number?

This can be found on property tax statement. Please attach a copy of the most recent property tax statement.

What was the most recent assessed value for real estate tax purposes?

This can be found on property tax statement. Please attach a copy of the most recent property tax statement.

*Attach a copy of the legal description. If possible, a copy of the deed is best.

*Attach a copy of the most recent property insurance statement.

..... continued, over

Is the property subject to any tax deferral, state or federal farm programs?

- No
- Yes (please explain)

Is the property located in a registered historic district or otherwise subject to preservation restrictions, such as easements, liens or restrictions on use?

- No
- Yes (please explain)

Is the property used or occupied by the owner or by a tenant?

- Owner
- Tenant

If rental property, is the property subject to rental control or Section 8 housing?

- Yes
- No

What was the most recent assessed value for real estate tax purposes?

If no written lease, please list term, rent schedule, tenant contact information or other relevant information.

Is the property in violation of any business codes?

- No
- Yes (please explain)

How is the property zoned?

How is the property used?

What is the estimated fair market value of the property?

Have you ever had the property appraised?

- No
- Yes

Appraiser _____

Date _____

Value _____

How did you acquire the property?

- Purchase
- Inheritance
- Gift

What was the date of acquisition?

What was the purchase or fair market value at the time of acquisition?

Is there currently a mortgage on the property?

- No
- Yes (please explain)

Name of Mortgagee _____

Balance owed _____

Have you taken any depreciation?

- No
- Yes (If so, please provide copies of your depreciation schedule and a list of improvements. InFaith will need this information to prepare tax documents).

Do you have any of the following? If so, please attach.

- Copy of a title insurance policy
- Abstract of title
- Survey
- Registered property abstract
- Owner's duplicate certificate of title
- Environmental assessment or Phase 1

Are there any floodplains, wetlands, lakes, drainage ponds, streams, rivers, canals or drainage ditches on the property?

- No
- Yes _____

Are there any boundary issues or do any buildings on your property encroach on the neighboring property?

- No
- Yes _____

What equipment, furniture, inventory, furnishings or other personal property are included with the real property?

Does the property adjoin a public road?

- No
- Yes

Is the property insured?

- No
- Yes (please explain)

Insurance company _____

Contact information _____

ENVIRONMENTAL QUESTIONS

Do you own the property?

- No
- Yes

Do you use and occupy the property?

- No
- Yes

What have been the uses of the property since you first owned or used it?

How was the property used before you first owned or used it?

Is any party of the property or adjoining party now being used or to the best of your knowledge has it ever been used for the following purposes?

| | | | |
|---|-----|----|------------|
| Industrial or manufacturing | Yes | No | Don't know |
| Fueling station | Yes | No | Don't know |
| Motor repair | Yes | No | Don't know |
| Commercial printing | Yes | No | Don't know |
| Dry cleaning | Yes | No | Don't know |
| Dump, junkyard, disposal, processing or recycling | Yes | No | Don't know |
| Cleaning/janitorial service | Yes | No | Don't know |
| Chemical plant | Yes | No | Don't know |
| Methamphetamine lab | Yes | No | Don't know |
| Pant store/factory | Yes | No | Don't know |
| Wood stripping/refurbishing | Yes | No | Don't know |
| Fiberglass manufacturing/distributing | Yes | No | Don't know |
| Tannery | Yes | No | Don't know |
| Mine or quarry | Yes | No | Don't know |

Are there now, or have there ever been, any of the following on the property?

| | | | |
|--|-----|----|------------|
| Septic systems | Yes | No | Don't know |
| Wells | Yes | No | Don't know |
| Buried waste materials | Yes | No | Don't know |
| Abandoned cars, trucks, vehicles, tires, or parts | Yes | No | Don't know |
| Batteries | Yes | No | Don't know |
| Barrels or containers of pesticides, herbicides, paint, or other chemicals stored/buried | Yes | No | Don't know |
| Industrial drums (55+ gallons stored on property) | Yes | No | Don't know |
| Fill dirt from contaminated site/unknown origin | Yes | No | Don't know |
| Pits, ponds, lagoons having to do with waste treatment or disposal | Yes | No | Don't know |
| Acres of stained soil on property | Yes | No | Don't know |
| Above/underground storage tanks | Yes | No | Don't know |
| Vent/fill pipes protruding from ground/next to structure | Yes | No | Don't know |
| Flooring/drains/walls located in building that are stained by substances other than water or that give off a foul odor | Yes | No | Don't know |
| Transformer, capacitor or any hydraulic equipment containing PCBs | Yes | No | Don't know |
| Floor tiles, ceiling material, insulation or other building materials containing asbestos | Yes | No | Don't know |

Do you know of any environmental assessment or inspection of the property that indicated the presence of hazardous substances, asbestos, PCBs or petroleum products on the property, or contamination of the property that recommended further assessment of property?

- No
- Yes _____
- _____
- _____

Do you know of any past or present governmental notifications or environmental liens relating to past or recurrent violations of environmental laws?

- No
- Yes _____

Do you know of any past, threatened or pending lawsuits or administrative proceedings concerning a release or threatened release of any hazardous substance or petroleum product involving the property?

- No
- Yes _____

Does the property discharge waste water on, or adjacent, to property other than storm water into a sanitary sewer system?

- No
- Yes _____

Has there ever been a pest infestation, including but not limited to, insects or rodents?

- No
- Yes _____

By signing this document, I understand that InFaith Community Foundation will be relying on the truth and accuracy of my answers to the questions in accepting my gift of real estate. I certify that each of the answers is true, accurate and complete to *the best of my knowledge*.

Signature

Date

Signature

Date

If the person signing is not the party using and occupying the property, the following must be completed:

Name of user _____

Phone number _____

Address _____

QUESTIONS? Call InFaith at 800-365-4172.

Please send this document and any supporting documents by mail or fax to the contact information below:

InFaith Community Foundation
Attn: InFaith Charitable Giving Services
625 Fourth Avenue South, Suite 1500
Minneapolis, Minnesota 55415
Phone: 800-365-4172 or Fax: 612-844-4109

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor's charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit inFaithFound.org.

inFaithFound.org 625 FOURTH AVENUE SOUTH SUITE 1500, MINNEAPOLIS, MINNESOTA 55415
p 800-365-4172 f 612-844-4109

© InFaith Community Foundation

