

# Real estate gift questionnaire



**First donor**

**Second donor full name** (if applicable)

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**Real estate information**

Type of property:

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

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What is the property tax identification number?

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

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

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

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

- No
  - Yes (please explain)
- 
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**Questions?**

Email our team at [thriventcharitable@thrivent.com](mailto:thriventcharitable@thrivent.com) or call 800-365-4172.

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

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?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Questions?**

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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. Thrivent 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?

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### 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?

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

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### Questions?

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Does the property adjoin a public road?

- No
- Yes

Is the property insured?

- No
- Yes

Insurance company \_\_\_\_\_

Contact information \_\_\_\_\_

Is any part of the property or adjoining part 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
- Paint 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

**Questions?**

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Do you know of any environmental assessment or inspection of the property indicating 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 (please describe) \_\_\_\_\_

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

No

Yes (please describe) \_\_\_\_\_

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 (please describe) \_\_\_\_\_

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

No

Yes (please describe) \_\_\_\_\_

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

No

Yes (please describe) \_\_\_\_\_

**Questions?**

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By signing this document, I understand Thrivent Charitable Impact & Investing® is 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?**

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**Please send this document and any supporting documents by mail or fax:**

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