

Real estate gift questionnaire



First donor

Second donor full name (if applicable)

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?

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.

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

- No
- Yes (please explain)

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

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. 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?

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?

Does the property adjoin a public road?

- No
- Yes

Is the property insured?

- No
- Yes (please explain)

Insurance company _____

Contact information _____

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
- 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

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 (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) _____

By signing this document, I understand that Thrivent Charitable Impact & Investing 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?

Email our team at thriventcharitable@thrivent.com or call 800-365-4172.

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

Thrivent Charitable Impact & Investing
600 Portland Avenue South, Suite 5100
Minneapolis, Minnesota 55415
Phone: 800-365-4172 Fax: 612-844-4109

About us

We believe humanity thrives when people make the most of all they've been given. Thrivent Charitable Impact & Investing™ helps people do just that—bring their generosity to life so that they can support the organizations and causes closest to their hearts, now and into the future. Grounded in our purpose to serve, we take a holistic, personalized approach to help our donors create strategic charitable plans and give in a way that best reflects their values and financial priorities. Together, we are committed to creating positive impact and inspiring lasting change in our communities



Thrivent Charitable Impact & Investing™, a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans, is a public charity that serves individuals, organizations and the community through charitable planning, donor-advised funds and endowments. Thrivent Charitable Impact & Investing works collaboratively with Thrivent and its financial professionals.

Charitable giving can result in significant tax, legal and financial consequences. Because Thrivent cannot give tax or legal advice, you are strongly encouraged to consult with your personal tax and legal advisors. To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.

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