

Carleton

Real Estate Worksheet

Today's Date: _____

PROPERTY OWNERSHIP & CONTACT INFORMATION

1. Name(s)/Legal owner(s) of property: _____
2. Mailing address of owner(s): _____
City _____ State _____ ZIP _____
3. Preferred Phone: (____) _____ Email(s): _____
4. Person providing information (if other than owner): _____
Relationship to the owner(s): _____
Phone: (____) _____ Email: _____

GOALS FOR YOUR GIFT (Please review all questions and then check those that apply to you)

5. Do you wish to give your property outright? () y () n
6. Do you wish to give a percentage of your property to Carleton? () y () n
7. Do you wish retain the right to use your property and make a gift () y () n
8. Do you wish to give your property and receive income for life () y () n

PROPERTY DESCRIPTION & CONDITION

9. Address/location of property proposed for gift: _____
City _____ State _____ ZIP _____

Brief description of property:

Residential

Single-Family Multi-Family Seasonal/Vacation Home Condominium Rental

Commercial, please describe: _____

Farmland, please describe: _____

Undeveloped land, please describe: _____

10. Land area (acres or sq. feet): _____ Building area (sq. feet): _____
11. Current uses of property: _____
12. Previous uses of property: _____

FINANCIAL & MARKET INFORMATION

13. Date of acquisition/inheritance: _____
14. Estimated current cost basis (include any improvements): _____
15. Amount of mortgage or other debt (if any) currently on property: _____
16. Has property recently been listed for sale? _____
- a. If yes, with whom and for what list price? _____
17. Estimated current Fair Market Value: _____

ENVIRONMENTAL

18. Any obvious or known environmental hazards associated with property, abutting properties, or previous uses?
- _____
- _____

ADDITIONAL INFORMATION

If any of the following are readily available, please consider attaching them. They will help the College better understand your unique property and situation, as well as assess marketability.

- Photos of the property
- Copy of latest tax bill
- Plat and/or Title Documents
- Copy of deed granting property to you
- Copy of your title insurance policy
- Copies of all existing leases involving the property
- Condominium association by laws and latest minutes

Thank you for providing as much information as you are able about your property to streamline the gift acceptance process. We look forward to being back in touch with you soon.

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