

**CLIENT QUESTIONNAIRE
REAL ESTATE TRANSACTION**

SELLER'S INFORMATION

Today's Date

Name Seller #1: _____
First (Full Legal Name) Middle Last

Name Seller #2: _____
First (Full Legal Name) Middle Last

Address: _____

Phone number: _____
(Best place to reach)

Social Security No.: _____ Email Address: _____
(For one of the Sellers) (For one of the Sellers)

Bank where your current loan is: _____ / _____
(Bank Name) (Bank Ph No.)

BUYER'S INFORMATION

Name Buyer #1: _____
First (Full Legal Name) Middle Last

Name Buyer #2: _____
First (Full Legal Name) Middle Last

Address: _____

Phone number: _____
(Best place to reach)

Social Security No.: _____ Email Address: _____
(For one of the Sellers) (For one of the Sellers)

Attorney for Buyer: _____ Bank used for financing: _____

How they want to take title: _____
(Joint tenants/Tenants in common/Etc.)

OTHER INFORMATION

Address of Property Selling: _____

Property Selling: _____ Principal Residence _____ Investment Property

Do you have the Abstract of Title to the property? _____
If so, has it been delivered to the Abstract Company? _____

Legal Description: Attach any paperwork reflecting the Legal Description if you have such paperwork.

Purchase Price:\$ _____ Closing Date: _____

Down Payment:\$ _____ Held in trust account until closing or given directly to Seller? _____

Taxes per year for real estate:\$ _____ Last payment made: _____

Which of the following documents are needed?

- | | |
|---|--|
| <input type="checkbox"/> Residential Purchase Agreement | <input type="checkbox"/> Promissory Note |
| <input type="checkbox"/> Contract | <input type="checkbox"/> Mortgage |
| <input type="checkbox"/> Warranty Deed | <input type="checkbox"/> Lease |
| <input type="checkbox"/> Escrow Agreement | |

Are there any wells, solid waste disposals, hazardous wastes, underground storage tanks, or private burial sites on the property? _____ If so, please give a description of which of the aforementioned is present, the type, number, location, and any other applicable descriptive information regarding the same:

Is the property served by a private sewer system? _____ If so, it must be inspected and found to meet statutory standards prior to the transfer of title.

If a Residential Purchase Agreement is involved:

Particular items that must be specified as staying with the real estate: _____

Particular items that must be specified as NOT staying with the real estate: _____

If a Contract is involved:

Length of Contract: _____

Payment terms: _____

Interest Rate: _____

If a Corporate Warranty Deed is involved:

Individual(s) who sign(s) the Deed: _____

Office/Title of said Individual(s): _____

Is there a Corporate Seal? _____

If a Lease is involved:

Length of Lease: _____

Payment terms: _____

Number of acres: _____

Need for termination? _____

Any other particulars of the transaction: