

_____ TO _____

REAL ESTATE INTAKE

Property Address: _____

SBL#: _____

SWISS: _____

Date of Contract: _____

Deposit on Contract: _____

Purchase Price: _____

Seller Concession: _____

Assessed Value: _____

Acres: _____

TOWN: _____

School: _____

Property Code: _____

County: _____

MTG/RATE EXP Date: _____

Seller(s) Full Name & Address:

Seller(s) Full Name & Address:

Email: _____

Email: _____

(Phone) _____

(Phone) _____

SSN: _____

SSN: _____

Buyer(s) Full Name & Address:

Buyer(s) Full Name & Address:

Email: _____

Email: _____

(Phone) _____

(Phone) _____

SSN: _____

SSN: _____

_____ TO _____

CLIENT TO PROVIDE ATTORNEY

Inventory of Documents Needed for Closing:

- 1. Deed of Property _____
- 2. Abstract of Property _____
- 3. School Tax Bill _____ Year Amount _____
- 4. County Tax Bill _____ Year Amount _____
- 5. Village/City Tax Bill (if any) _____ Year Amount _____
- 6. Water/Sewer Bill (if any) _____ Year Amount _____

Name of Realtor Involved/Contact (if any) _____

*** Questions for Seller Only:**

Is there an outstanding mortgage on the property: (yes/no)

If yes, list name and address of Mortgage Company: _____

Account No: _____

Is there an existing survey map of the property: (yes/no)

*** Questions for Buyer Only:**

Indicate where you would like future tax bills to be sent, if different than the address above: _____

Please list any contingencies to the purchase offer (ex. Structural inspection to be done/ pest inspection, etc.): _____

OTHER INFO:

