

CLIENT INTAKE QUESTIONNAIRE (PURCHASE)

Thank you for choosing our office to represent your interests in your purchase. In order for us to better represent your interests in this transaction, please take a moment to answer the following preliminary questions prior to your conference with the attorney. Please note that certain documents may need to be returned with this form. If you have any questions, please do not hesitate to call our office.

BASIC CONTACT INFORMATION:

Full name(s) to appear on title: _____

(This should be the spelling of your name as it appears on a government ID, driver's license, passport, etc.) **Please attach ID.**

Are you currently married? Yes No

If no, how would you like to hold title: _____

(Options: **Joint Tenancy** [the holding of an estate or property jointly by two or more parties, the share of each passing to the other or others on death] OR **Tenants in Common** [a shared tenancy in which each holder has a distinct, separately transferable interest].)

Current mailing address: _____

Phone (mobile): _____

Phone (home): _____

Email address: _____

Secondary email address: _____

Notes regarding contact: _____

ESTATE INFORMATION (if applicable):

Name of Estate: _____

Executor of Estate: _____

EIN Number for Estate: _____

Has the Estate been probated? Yes No

Please provide copies of the following along with this form:

1. Death Certificate
2. Letters Testamentary

BUSINESS ENTITY INFORMATION (if applicable):

Type of Entity: _____

(Corporation / LLC / LLP / General Partnership)

Tax ID Number: _____

Please provide copies of the following along with this form:

1. Articles of Incorporation/Bylaws (if applicable)
2. Operating Agreement (if applicable)
3. Proof of Publishing (if applicable)

PROPERTY INFORMATION:

Property Address: _____

Property/Transaction type: _____

(Single family Residential, Multi-Family Residential, Vacant Land, Condominium, Co-Operative Apartment, Commercial, Foreclosure/Short Sale, etc.)

Property Heating Type (please circle): Oil Natural Gas Electric Other (please specify): _____

Property Utilities (please circle): Public Sewer Public Water Private Well Septic System

Have you had an inspection of the property? Yes No - **If YES, please attach inspection report.**

If yes, what inspections have you had completed? (Check all that apply)

Well Inspection:

Septic Inspection:

Termite/Rodent Inspection:

Home/Engineer Inspection:

Radon Inspection:

Lead Based Paint Inspection:

Mold Inspection:

Storage Tank Inspection:

If you checked any of the above, please list any areas of concern: _____

(Please include in this section any repairs/remediations you wish for Seller to make or credits to be requested).

Unique Characteristics of the Property: _____

(Pools, sheds, finished basement, additions, alterations, etc.)

Personal Property Inclusions (Please cross-out any personal items below that do not apply/are not included):

Plumbing, Heating, Lighting and Cooking Fixtures, Chandeliers, Bathroom and Kitchen Cabinets and Counters, Mantels, Door Mirrors, Switch Plates and Door Hardware, Venetian Blinds, Window Treatments, Shades, Screens, Awnings, Storm Windows, Storm Doors, Window Boxes, Mail Box, Television Aerials, Weather Vane, Flagpole, Pumps, Shrubbery, Fencing, Outdoor Statuary, Tool Shed, Dishwasher, Washing Machine, Clothes Dryer, Garbage Disposal Unit, Range, Oven, Built-in Microwave Oven, Refrigerator, Freezer, Air Conditioning Equipment and Installations, Wall to Wall Carpeting.

Other inclusions: _____

Exclusions: _____

LENDER INFORMATION:

Lending Institution Name: _____

Loan Officer Name: _____

Loan Officer Email: _____

Loan Officer Phone Number: _____

Amount to be Financed: _____

Loan Type: _____

(Conventional / VA / FHA / Other)

HOMEOWNER'S INSURANCE AGENT INFORMATION:

Company Name: _____

Name of Agent: _____

Agent Phone Number: _____

Agent Email: _____

REALTOR INFORMATION:

Realtor Name: _____

Realtor Company: _____

Realtor Phone Number: _____

Realtor Email Address: _____

How did you hear about our office?

Referral/Recommendation: _____

Social Media: _____

Website: _____

Word of Mouth?