

CLIENT INTAKE QUESTIONNAIRE (SALE)

Thank you for choosing our office to represent your interests in your sale. 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 Contract: _____

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

Parties currently on the deed: _____

Are you currently married? Yes No

Current mailing address: _____

Phone (mobile): _____

Phone (home): _____

Email address: _____

Secondary email address: _____

Notes regarding contact: _____

Please provide copies of the following along with this form (if in your possession):

1. Deed
 2. Prior Title Policy
 3. Survey of Property
 4. Certificates of Occupancy (if applicable)
 5. Leases with Tenants Current in Possession of the Property (if applicable)
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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
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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)
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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

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: _____

Do you currently reside in the property? _____

If yes, please specify the date you intend to vacate the property: _____

If no, are there currently any tenants with leases on the property? _____

(If yes, please attach any leases and security deposit information you may have in your possession)

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?