



Real Estate Information Statement

PFA.FRM.REIS.1008

Increasing Effective Giving

Real Estate Information Statement

SUMMARY OF REAL ESTATE DONATION PROCESS

Please complete the following information statement and submit it to the Philanthropy of America (the "Philanthropy Fund") by mail or by fax to the address listed above. Before any donation of real estate may be accepted, the Philanthropy Fund must complete due diligence of the property.

DONOR INFORMATION

Please complete the following summary of basic donor information.

Primary Donor

_____ Donor's Complete Name		_____ Social Security Number	
()	()	_____	
_____ Daytime Phone	_____ Evening Number	_____ Mailing Address	
_____ Email Address	_____ City	_____ State	_____ Zip

Secondary Donor (joint custody, tenant-in-common, other joint ownership)

_____ Donor's Complete Name		_____ Social Security Number	
()	()	_____	
_____ Daytime Phone	_____ Evening Number	_____ Mailing Address	
_____ Email Address	_____ City	_____ State	_____ Zip

FINANCIAL ADVISOR INFORMATION

_____ Financial Advisor Name		_____ Broker/Dealer Firm	
()	_____		
_____ Daytime Phone	_____ Email		

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In order for the Philanthropy Fund to make its initial evaluation of a potential gift of real estate, you must provide the following information for review. If you need assistance filling out this form, please call us toll free at 1.866.988.4483.

I. OWNERSHIP FORM

Please identify the form of ownership and registered owners.

- Individually
 Partnership
 Joint Tenants
 Tenant-in-Common
 Single Member LLC
 C Corporation
 S Corporation
 Trust
 Multi-Member LLC

Are all parties with an ownership interest seeking to donate the property? _____ Yes _____ No

If yes, does the Primary Donor have authority to donate the property on behalf its owners? _____ Yes _____ No

If no, does the Primary Donor need consent of all owners prior to donating its interest? _____ Yes _____ No

Is there a First Right of Refusal to Purchase Clause on the property? _____ Yes _____ No

Please provide, together with this Statement, the necessary documentation to support your authority (certificate of authority, corporate resolutions, power of attorney, member consent, etc.).

Estimated Property Value: _____ Estimated Donation Amount: _____

Property Insurance Provider: _____ Phone: _____

II. PROPERTY DESCRIPTION

Please provide answers to the following questions within the area provided, if possible. If more room is needed to respond, please attach separately.

a. Property Location

Street Address	City	State	Zip
County	Subdivision (if applicable)		

b. Property Type (check all that apply)

- Office*
 Retail*
 Multi-family*
 Industrial*
 Primary Residence
 Condominium
 Single-family
 Rental Home
 Vacant Land
 Hotel
 Mixed Use* (describe) _____ Other (describe) _____

*If available, please submit a detailed rent roll for all commercial property or a unit mix sheet for multi-family property

Zoning Classification: _____

Current Use (if different than specified Property Type): _____

Current Use is: Legal Non-Conforming
 Conforming
 Illegal Non-Conforming
 Don't Know

Are you aware of any change in zoning that is pending or threatened? _____ Yes _____ No

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c. Property Characteristics (check any/all that apply)

Tenant(s): Multi-Tenant Single-Tenant NNN Lease(s) NN Lease(s) N Lease(s)
 Non-paying or Bankrupt Tenants

Construction: Concrete Frame Pitched Roof Flat Roof Brick
 Masonry

Location: Rural Suburban Central Business District
 Other _____

Number of Units/Keys: _____ Total Square Footage: _____ Land Area (acres): _____
(only net rentable if income-producing property)

d. General Condition of Property

Excellent - Well maintained, recent capital expenditures, no deferred maintenance, minimal wear and tear.
 Good - Well maintained, minimal deferred maintenance, wear and tear typical for age/use.
 Fair - Deferred maintenance, extensive wear and tear.
 Poor - Major deferred maintenance, extensive wear and tear, structural issues.

Year Constructed: _____ Year(s) Renovated: _____ Est. Capital Expenditures (Past 2 Years): \$ _____

e. Utility Services (check any/all available)

Public Water Well Water Public Sewer Septic Tank Gas Electric Propane
 Sprinkler System Cable Phone Internet Other(list): _____

Services Paid by Tenant(s): Water/Sewer Electric Gas Cable
 Phone/Internet

f. Property Value/Debt

Estimated Fair Market Value: \$ _____

Source: Appraisal Broker Opinion of Value Third-Party Offer (Date: _____)
 Tax Assessor Educated Guess
 Comparable Property Sale (\$ _____ Address: _____ Date: _____)

Annual Net Operating Income: \$ _____ Current Annual Real Estate Taxes: _____

Year Acquired: _____ Original Purchase Price: _____

Has a buyer for the property already been identified? _____ Yes _____ No

Do you have a Real Estate Broker? _____ Yes _____ No

Has the property been listed within the past year? _____ Yes _____ No

Date recently listed: _____

Real Estate Broker Name: _____ Company: _____ Phone: _____

Current Debt on Property: \$ _____ Is debt assumable? _____ Yes _____ No

III. PROPERTY DISCLOSURES

Please answer the following questions to the best of your knowledge. If you answer yes to any of the following please provide a summary description on the available pages attached hereto and attach any documentation you feel is pertinent or necessary.

a. Environmental Considerations

To the best of your knowledge, is any part of the land area situated in a flood zone or wetlands area? Yes No

To the best of your knowledge, has the property ever been designated a Superfund Site or required other environmental remediation? Yes No

Are you aware of any underground tanks or toxic substances on the property, or adjacent properties, (both structure or soil), such as asbestos, polychlorinated biphenyls (PCBs), urea-formaldehyde, methane gas, radioactive material, radon, benzene or others? Yes No

To the best of your knowledge, has the property been tested for radon or any other toxic substances? Yes No

If residential, was any part of the residential dwelling constructed before 1978? Yes No

If yes, has it been tested for asbestos or lead paint? Yes No

Are you aware of any mold conditions? Yes No

Has property been tested for mold? Yes No

To the best of your knowledge, are there any burial pits, mineshafts, wells (in use or abandoned) or landfills (other than foundation backfill) on property? Yes No

Are you aware of any sliding, settling (other than normal settling), earth movement, sinkholes, upheaval, or earth stability/expansive soil or clay problems? Yes No

Are you aware of any diseased, fallen or dead trees or shrubs? Yes No

Are you aware of any endangered plants or wildlife located on the property? Yes No

b. Structural Considerations

Are you aware of any improvements located on filled or expansive soil, or are there foundation, structural, or soil problems on the property (including the driveways and the parking areas)? Yes No

Are you aware of any encroachments, unrecorded easements, or boundary line disputes with respect to the property? Yes No

Are you aware of any additions, structural changes, or any other major alterations or improvements to the Property? Yes No

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c. Regulatory Considerations

Are you aware of any easements or agreements (including public or private utilities and sewers) under or over the property? If yes, please attach survey. _____ Yes _____ No

Are you aware of any instances where necessary permits and/or approvals were not obtained? _____ Yes _____ No

Are you aware of any work done to the property that did not comply with building codes or zoning regulations? _____ Yes _____ No

Do you know of any violations of Deed Restrictions affecting the property? _____ Yes _____ No

To the best of your knowledge, is the property located in an area where public authorities are contemplating proceedings for freeway, thoroughfare, rail or utility construction, a redevelopment project, street widening or lighting, or other similar public projects? _____ Yes _____ No

d. Repairs

If there are any defects or needed repairs other than the normal maintenance, please designate below and describe in further detail on the attached pages.

- Electrical/Mechanical systems (including A/C & heating equipment)
- Plumbing systems, drains and sprinkler systems
- Exterior walls/foundation/structural components
- Parking areas and driveways
- Roof
- Windows or doors
- Lawn, landscaping and planters
- Other

If any of the above apply, please describe here: _____

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IV. ACKNOWLEDGEMENTS AND REPRESENTATIONS (to be signed by all donors)

By signing below, I/we hereby represent that I have carefully completed and reviewed all of the information on this Real Estate Information Statement, and to the best of my knowledge, all of such information is true and correct, including all attachments. I/we have included in this Statement all material facts of which I/we have knowledge concerning the physical condition or value of the property. I/we will inform the Philanthropy Fund of any material change concerning the property, which may arise before or during the term or extension of any agreements or any sales contracts. Any material misstatement of fact, whether by commission or omission, will serve as grounds to void any agreement between the Philanthropy Fund of America and the Donor(s). The Philanthropy Fund of America is hereby authorized to disclose the foregoing information to the public.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

V. NEXT STEPS AND REAL ESTATE CHECKLIST

If available, please submit the following documents along with the Real Estate Information Statement.

Commercial Property (retail, industrial, office, mixed-use)

- Current Rent Roll (including lease options and CAM charges)
- Annual Income and Expense Report

Multi-Family

- Current Unit Mix
- Annual Income and Expense Report

We will then contact you with further instructions and the next steps.

To submit your completed Real Estate Information Statement and supporting documentation, please mail to:

Philanthropy Fund of America
c/o Real Estate Due Diligence Group
9780 Mount Pyramid Court, Suite 401
Englewood, Colorado 80112

You may also send via email to realestate@philanthropyfund.org or fax to (866) 644-5392 Attn: Real Estate Due Diligence Group.

FOR USE BY DONOR

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