

Real estate gift questionnaire

First donor legal name**Second donor legal name** (if applicable)**First donor phone number****Second donor phone number** (if applicable)**Real estate information**

Type of property:

- | | | |
|--|---|--|
| ☐ Raw land of ____ acres | ☐ Single-family residence | ☐ Apartment building |
| ☐ Industrial | ☐ Warehouse | ☐ Agricultural/ranch of ____ acres |
| ☐ Recreational | ☐ Condominium | ☐ Commercial |
| ☐ Other: _____ | | |

How is the title held?

- ☐ By a married couple in joint tenancy
- ☐ By a married couple as tenants in common
- ☐ By an individual
- ☐ By individuals as tenants in common
- ☐ By individuals in joint tenancy
- ☐ By a partnership
- ☐ By a trustee
- ☐ By a corporation
- ☐ Other: _____

What is the street address of this real estate?

What is the property tax identification number?

This is found on the property tax statement. Please attach a copy of the most recent property tax statement.

Questions?

Connect with our team at thriventcharitable@thrivent.com or 800-365-4172.

What was the most recent assessed value for real estate tax purposes?

This is found on the property tax statement. Please attach a copy of the most recent property tax statement.

Is the property subject to any tax deferral program or state or federal farm program?

☐ No

☐ Yes (please explain)

Is the property located in a registered historic district or otherwise subject to preservation restrictions, such as easements, liens or restrictions on use?

☐ No

☐ Yes (please explain) _____

How is the property used? _____

What is the estimated fair market value of the property?

Is the property used or occupied by the owner or by a tenant?

☐ Owner

☐ Tenant

If rental property, is the property subject to rental control or Section 8 housing?

☐ Yes

☐ No

Have you ever had the property appraised?

☐ No

☐ Yes

Appraiser _____

Date _____

Value _____

Is the property in violation of any business codes?

☐ No

☐ Yes (please explain) _____

How did you acquire the property?

☐ Purchase

☐ Inheritance

☐ Gift

How is the property zoned? _____

What was the date of acquisition? _____

Questions?

Connect with our team at thriventcharitable@thrivent.com or 800-365-4172.

What was the purchase or fair market value at the time of acquisition?

Is there currently a mortgage on the property?

- ☐ No
☐ Yes (please explain)

Name of mortgagee _____

Balance owed _____

Have you taken any depreciation?

- ☐ No
☐ Yes (If so, please provide copies of your depreciation schedule and a list of improvements. Thrivent Charitable needs this information to prepare tax documents.)

Do you have any of the following? If so, please attach.

- ☐ Copy of a title insurance policy
☐ Abstract of title
☐ Survey
☐ Registered property abstract
☐ Owner's duplicate certificate of title
☐ Environmental assessment or Phase 1

Environmental questions

Do you own the property?

- ☐ No
☐ Yes

Do you use and occupy the property?

- ☐ No
☐ Yes

Are there any floodplains, wetlands, lakes, drainage ponds, streams, rivers, canals or drainage ditches on the property?

- ☐ No
☐ Yes _____

Are there any boundary issues or do any buildings on your property encroach on the neighboring property?

- ☐ No
☐ Yes _____

What equipment, furniture, inventory, furnishings or other personal property are included with the real property?

Does the property adjoin a public road?

- ☐ No
☐ Yes

Is the property insured?

- ☐ No
☐ Yes

Insurance company _____

Contact information _____

What have been the uses of the property since you first owned or used it?

How was the property used before you first owned or used it?

Questions?

Connect with our team at thriventcharitable@thrivent.com or 800-365-4172.

Is any part of the property or adjoining part now being used or to the best of your knowledge has it ever been used for the following purposes?

- Industrial or manufacturing..... ☐ Yes ☐ No ☐ Don't know
- Fueling station ☐ Yes ☐ No ☐ Don't know
- Motor repair ☐ Yes ☐ No ☐ Don't know
- Commercial printing ☐ Yes ☐ No ☐ Don't know
- Dry cleaning..... ☐ Yes ☐ No ☐ Don't know
- Dump, junkyard, disposal, processing or recycling ☐ Yes ☐ No ☐ Don't know
- Cleaning/janitorial service ☐ Yes ☐ No ☐ Don't know
- Chemical plant..... ☐ Yes ☐ No ☐ Don't know
- Methamphetamine lab ☐ Yes ☐ No ☐ Don't know
- Paint store/factory..... ☐ Yes ☐ No ☐ Don't know
- Wood stripping/refurbishing ☐ Yes ☐ No ☐ Don't know
- Fiberglass manufacturing/distributing ☐ Yes ☐ No ☐ Don't know
- Tannery ☐ Yes ☐ No ☐ Don't know
- Mine or quarry ☐ Yes ☐ No ☐ Don't know

Are there now, or have there ever been, any of the following on the property?

- Septic systems ☐ Yes ☐ No ☐ Don't know
- Wells ☐ Yes ☐ No ☐ Don't know
- Buried waste materials..... ☐ Yes ☐ No ☐ Don't know
- Abandoned cars, trucks, vehicles, tires or parts..... ☐ Yes ☐ No ☐ Don't know
- Batteries..... ☐ Yes ☐ No ☐ Don't know
- Barrels or containers of pesticides, herbicides, paint or other chemicals stored/buried ☐ Yes ☐ No ☐ Don't know
- Industrial drums (55+ gallons stored on property)..... ☐ Yes ☐ No ☐ Don't know
- Fill dirt from contaminated site/unknown origin ☐ Yes ☐ No ☐ Don't know
- Pits, ponds, lagoons having to do with waste treatment or disposal..... ☐ Yes ☐ No ☐ Don't know
- Acres of stained soil..... ☐ Yes ☐ No ☐ Don't know
- Above/underground storage tanks..... ☐ Yes ☐ No ☐ Don't know
- Vent/fill pipes protruding from ground/next to structure..... ☐ Yes ☐ No ☐ Don't know
- Flooring/drains/walls located in building stained by substances other than water or giving off a foul odor..... ☐ Yes ☐ No ☐ Don't know
- Transformer, capacitor or any hydraulic equipment containing PCBs..... ☐ Yes ☐ No ☐ Don't know
- Floor tiles, ceiling material, insulation or other building materials containing asbestos..... ☐ Yes ☐ No ☐ Don't know

Questions?

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Do you know of any environmental assessment or inspection of the property indicating the presence of hazardous substances, asbestos, PCBs or petroleum products on the property, or contamination of the property recommending further assessment?

☐ No

☐ Yes (please describe) _____

Do you know of any past or present governmental notifications or environmental liens relating to past or recurrent violations of environmental laws?

☐ No

☐ Yes (please describe) _____

Do you know of any past, threatened or pending lawsuits or administrative proceedings concerning a release or threatened release of any hazardous substance or petroleum product involving the property?

☐ No

☐ Yes (please describe) _____

Does the property discharge waste water on, or adjacent to, property other than storm water into a sanitary sewer system?

☐ No

☐ Yes (please describe) _____

Has there ever been a pest infestation including, but not limited to, insects or rodents?

☐ No

☐ Yes (please describe) _____

By signing this document, I understand Thrivent Charitable Impact & Investing is relying on the truth and accuracy of my answers to the questions in accepting my gift of real estate. I certify each of the answers is true, accurate and complete to the best of my knowledge.

Signature

Date

Signature

Date

Questions?

Connect with our team at thriventcharitable@thrivent.com or 800-365-4172.

If the person signing is not the party using and occupying the property, the following must be completed:

Name of user _____

Phone number _____

Address _____

Questions?

Connect with our team at thriventcharitable@thrivent.com or 800-365-4172.

Please return this completed form and any supporting documents by mail, fax, or online secure upload to:

Thrivent Charitable

PO Box 8072

Appleton, WI 54912-8072

Fax: 612-844-4109

www.thriventcharitable.com/share-files

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