

**Information About Real Estate** (complete a separate sheet for each property owned)

Property Address (Street #, City, State, Zip Code)	
Is property on 2.5 acres or less?	
Is this a completed dwelling that has actually been lived in by someone?	
Have you personally lived in the property? If yes, what dates have you personally lived in the property?	
Date Purchased?	
Purchase Price. <sup>1</sup>	
Did you get any money back from the Seller when you bought this property? If yes, how much?	
What percentage of the purchase price was financed by loans secured by the property?	
Estimated Current Fair Market Value of the Property	
Have you claimed depreciation on this property on your tax return <sup>2</sup>	
List the names of all persons or entities that are on title to this property, unless you are single and you are the only owner.	
How many loans are there against this property at this time (please complete a debt information sheet for each loan)	
Did you acquire this property through a 1031 exchange?	
Is this property currently rented out? If yes, how much rental income is being received?	
Approximately how much have you spent to make improvements to this property, such as major remodeling etc.	
Is the property currently listed for sale? If yes, with whom and how long has it been listed? What is the asking price?	

<sup>1</sup> Please provide copy of closing statement if available

<sup>2</sup> Please provide a copy of your most recent tax return, including all schedules and attachments

## **Real Property Debt Information**

(Fill out a separate sheet for each loan against real property)

Address of Property that is security for this loan	
Lender Name	
Account Number	
Original Loan Amount	
Current Loan Balance (Approximate if unknown) <sup>1</sup>	
Interest Rate	
Is this an adjustable rate loan?	
What is the monthly payment?	
Are the monthly payments current? If not, how many payments are past due?	
Have you received a foreclosure notice? <sup>2</sup>	
Is this a purchase money loan (a loan obtained to close on the purchase of the property)	
If this is not a purchase money loan, what date was the loan obtained?	
If this is not a purchase money loan, was any portion of this loan used for something other than to pay off an existing loan against this property? If yes, how much of this loan was not used to pay off an existing loan against this property, and what was done with that money? <sup>3</sup>	
Is this loan in first position against this property? If not, what position is it in?	

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<sup>1</sup> Please provide a copy of the most recent statement from the lender

<sup>2</sup> Please provide a copy of the most recent foreclosure notice

<sup>3</sup> Please provide a copy of the closing statement for any non-purchase money loan