**CLIENT INFORMATION SHEET - REAL ESTATE**

File no.:



Source of Client:



Fee agreed upon:



Client (buyer/seller/refinance)

Address:



Telephone no. (Work):



Telephone no. (Home):



Fax no. (Work/home):



Beeper/cellular telephone no.:



Email:



Marital status

Single/divorced/widowed/married/remarried:



Former names used by client:



Type of transaction

Sale:



Purchase:



Other:



Contingent on purchase/sale of other premises:



Location of property

Address:



Legal description:



Intended use of property

Primary residence:



Rental:



Desired type of ownership

Tenants by the entireties:



Tenants in common:



Joint tenants (wros):



Other:



Other party (buyer/seller)

Address:



Telephone no. (Work):



Telephone no. (Home):



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Fax no. (Work/home):



Beeper/cellular telephone no.:



Email:



Other party's attorney

Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Client contacts (person(s) whom client already has contacted)

Purpose/result of contact:



Status of negotiations:



Current status of property

Leased:



Occupied by seller:



Vacant:



Contract closing information

Date:



Place:



Closing agent:



Contact person:



Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Contract Deadlines

Financing:



Inspection period:



Title/survey period:



Financing arrangements

Financing deadline:



Type of financing (institutional lender/assumption/seller financing/etc.):



Name of lender:



Loan no.:



Address of lender:



Telephone no.:



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Fax no.:



Email:



Date loan commitment issued:



Expiration date of loan commitment:



Terms of loan:

Amount:



Points:



Discount:



Origination:



Rate:



Fixed or Adjustable:



Realtors

Selling agent:



Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Listing agent or cooperating Realtor:



Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Listing contract:



Type (open/exclusive/etc.):



Expiration date:



Title information

Prior policy information (if available):



Abstract information (if available):



Date title work ordered and from what company:



Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Order no:



Promise date for title work:



Date title work received:



Policies to be issued:



Owner's amount:



Lender's amount:



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Lender endorsements required:



Pre-Closing title search completed:



Date covered (from/to):



Name of person searching:



Post-closing title search (gap period):



Date ordered:



Date covered (from/to):



Name of person searching:



Survey Information

Prior survey available:



Date of update:



New survey ordered:



Survey no.:



Promise date for survey:



Date survey received:



Surveyor:



Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Fee for survey:



Date survey provided to title insurer:



Elevation certificate ordered:



Fee for elevation certificate:



Form 9 review requested:



Fee for Form 9 review:



Verification/estoppel letters

Date letters requested:



Persons from whom requested (list city or other agency):

Address:



Telephone no.:



Fax no.:



Beeper/cellular telephone no.:



Email:



Fee charged:



Mortgage payoff information

Mortgagee:



Address:



Telephone no.:



Fax no.:



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Email:



Loan no.:



Date payoff requested:



Date payoff received:



Mortgage assumption information

Name of company:



Address:



Telephone no.:



Fax no.:



Email:



Date assumption package requested:



Date assumption package received:



Second mortgage information

Name:



Address:



Telephone no.:



Fax no.:



Email:



Loan no.:



Date payoff letter requested:



Date payoff letter received:



Property assessments/associations

Services provided by association:



Name (master or main):



Address:



Telephone no.:



Fax no.:



Email:



Association consent to transfer title requested (if required):



Written consent received:



Pending assessments:



Certified liens:



Special assessments:



Amounts due and due dates of assessments and liens:



Date estoppel letter requested:



Date estoppel letter received:



Name (sub-association):



Services provided by association:



Address:



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Telephone no.:



Fax no.:



Email:



Association consent to transfer title requested (if required):



Written consent received:



Pending assessments:



Certified liens:



Special assessments:



Amounts due and due dates of assessments and liens:



Date estoppel letter requested:



Date estoppel letter received:



Property tax information

Folio or parcel identification no.:



Gross amount:



November amount:



Homestead: Yes/No



Waste fee information

Pending liens:



Certified liens:



Insurance information

Company:



Agent:



Address:



Telephone no.:



Fax no.:



Email:



Water/Sewer information

Company:



Address:



Telephone no.:



Fax no.:



Email:



Pending liens:



Closing holdback amount:



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