



Real Estate Intake Sheet

SELLER(S):

Name: _____

Name: _____

Marital Status: _____

Marital Status: _____

Address: _____

Address: _____

Phone Number: _____

Phone Number: _____

Email Address: _____

Email Address: _____

*In the state of MN a spouse who is not in title to a property is still required to sign off on a sale.

BUYER(S):

Name: _____

Name: _____

Marital Status: _____

Marital Status: _____

Address: _____

Address: _____

Phone Number: _____

Phone Number: _____

Email Address: _____

Email Address: _____

*Taking title as: Joint Tenants Tenants in Common

Property Information

PROPERTY ADDRESS:

What type of Real Estate Document Wanted:

- Warranty Deed Trustee's Deed
- Quit Claim Deed Transfer on Death Deed
- Deed in Fulfillment of Contract for Deed
- Affidavit of ID and Survivorship

PROPERTY ID OR LEGAL DESCRIPTION:

Attach a copy of your deed, etc.

Is this property transfer a _____ gift, a _____ sale or _____ Trade

County: _____

Purchase Price: \$ _____

Are there any mortgages or liens on the property?

- Yes No

Please explain what you hope to accomplish with this property transaction: _____

Docs to provide to LHT&F (LHT&F staff to indicate):

- Copy of Vesting Deed(s)
- Certified Copy of Death Certificate
- Copy of Recorded Transfer on Death Deed
- Other: _____
- Property Tax Statement(s)
- Copy of Recorded Contract for Deed
- DOB & SSN for: _____

HOW WERE YOU REFERRED TO US? I AM A PREVIOUS CLIENT OFFICE SIGN FIRM WEBSITE

SEMINAR OR CLINIC BAR ASSOCIATION WEBSITE SOCIAL MEDIA

PERSONAL REFERRAL FROM: _____ OTHER: _____