

**PLANNED GIVING CONCEPTS, INC.**

Real Estate Data  
(Provide Additional Pages as Necessary)

Name of Trust: \_\_\_\_\_

Date Created: \_\_\_\_\_

Date of Contribution to CRT: \_\_\_\_\_

Property Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Purchase Date: \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_

Adjustments to Cost Basis: \$ \_\_\_\_\_

Basis on Gift Date: \$ \_\_\_\_\_

Appraised Value of the Property: \$ \_\_\_\_\_

Date of Appraisal \_\_\_\_\_

Name of Appraiser \_\_\_\_\_

Is there a mortgage on the property? Yes: \_\_\_\_\_ No: \_\_\_\_\_

If Yes, is the mortgage Arecourse debt@? Yes: \_\_\_\_\_ No: \_\_\_\_\_

The Internal Revenue Service has privately determined that it will disqualify a charitable remainder trust funded with mortgaged property in which the trustmaker remains personally liable. PLR 9015049.

If ANon-recourse debt@, please attach a copy of the mortgage documents.

Is the property current leased? Yes: \_\_\_\_\_ No: \_\_\_\_\_

If leased, please send a copy of the lease, or a description of the terms of the lease, if oral.

Is the property currently listed with a broker? Yes: \_\_\_\_\_ No: \_\_\_\_\_

If Yes, Name of Broker: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Has an offer for the property been accepted? Yes: \_\_\_\_\_ No: \_\_\_\_\_

If yes, please attach a copy of the sales contract

Miscellaneous:

1. Present Use (Farming, Residential, Commercial, etc.) --  
Please describe: \_\_\_\_\_  
\_\_\_\_\_
2. Adaptable to Other Use? Yes: \_\_\_\_\_ No: \_\_\_\_\_
3. Zoning Class: \_\_\_\_\_
4. Are there any potential liabilities such as ponds, open wells, cellars, sewers, ditches, etc. on the property? Yes: \_\_\_\_\_ No: \_\_\_\_\_ If Yes, please attach a full description.
5. Real Estate Taxes: \_\_\_\_\_ When Due? \_\_\_\_\_

I (we) certify that this information is true and correct to the best of my (our) knowledge and belief.

\_\_\_\_\_  
Signature of Trustmaker Date

\_\_\_\_\_  
Signature of Trustmaker Date