

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): _____

	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.: _____

	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: _____

	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.: _____

	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: _____

	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: _____