



**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.*

County: \_\_\_\_\_

Is this property transfer a \_\_\_\_\_ gift, a \_\_\_\_\_ sale  
or \_\_\_\_\_ Trade

**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: \_\_\_\_\_