

**REAL ESTATE – RESIDENTIAL SALE
INTERVIEW FORM**

CLIENT INFORMATION

Client's Name: _____

Client's Address: _____

County: _____

Client's Phone: Home: _____ Time to Call: _____

Employer's Name: _____

Office: _____ ext. _____

Fax: _____ Hours: _____

Client's SS#: _____ Client's D.O.B. _____

INTERVIEW QUESTIONS

Parties

1. Sellers Name(s): _____

Address: _____

Phone: (*Home*): _____ (*Work*): _____

Seller(s) Social Security Number(s): _____

2. Is title held in a trust: ____ Yes ____ No.

If yes, answer the following:

Trust Ownership: _____

Address of Trustee: _____

Phone: _____ Fax: _____

Trust Beneficiaries: _____

Power of Direction granted to: _____

Security assignments, if any: _____

3. Buyers Name(s): _____

Address: _____

Phone: (Home): _____ (Work): _____

Buyer(s) Social Security Number(s): _____

4. Is title to be deeded into trust: ____ Yes ____ No.

If yes, answer the following:

Name of Trust: _____

Address of Trustee: _____

Phone: _____ Fax: _____

Date of Trust Agreement: _____

Real Estate Agent Information

5. Listing office: _____

Agent Name: _____

Address: _____

Phone: _____ Fax: _____

6. Selling office: : _____

Agent Name: _____

Address: _____

Phone: _____ Fax: _____

7. Commission terms: _____

Description of Property

8. Common address: _____

9. Legal Description: _____

Seller's Existing Mortgage

10. Loan No. _____
Mortgage approx.. Balance: \$ _____
11. Insurance Escrow approximate balance: \$ _____
12. Loan Servicer: _____
13. Tax and Insurance Escrow info: _____

14. Is this a VA/FHA loan: ____ Yes ____ No. If yes, then answer the following:
Prepayment restrictions: _____
Notification terms/requirements: _____

Buyer's Proposed Mortgage

15. Lender's Name: _____
Address: _____

16. Contact person: _____
17. Proposed Mortgage Amount: \$ _____
18. Lender's required endorsements:

Personal Property

19. The following items of personal property are included in the sale: _____

20. The following items of personal property are included in the sale: _____

Possession

21. Date possession to be delivered: _____
22. Daily rental for post-closing possession: \$ _____
23. Who pays utilities: ___ Seller ___ Buyer
24. Who pays condo assessments: ___ Seller ___ Buyer
25. Possession Escrow amount: \$ _____
26. Possession Escrow Escrowed: _____

Condo Association

27. Name of contact person: _____
- Address: _____
- _____
- Phone: _____ Fax: _____
28. Monthly assessments: _____
29. Special assessments: _____
30. Master Insurance Policy: Agent: _____
- Phone: _____

Real Estate Disclosure Form

31. Date completed by Seller: _____
32. Date received by Buyer: _____

Lead Paint Disclosure

33. Was the property built prior to 1978: ___ Yes ___ No. If yes, have the Lead paint
Disclosure requirement been met: ___ Yes ___ No

Real Estate Taxes

34. Permanent index number: _____
35. Amount and year of last tax bill: \$ _____
36. Existing exemption: Homestead _____ Senior _____
37. Is tax bill divided: : ___ Yes ___ No
38. Is property currently assessed as improved: ___ Yes ___ No

Premises Inspection

39. Contract contingency terms: _____
- _____

40. Termite inspection requirements: _____

41. Pre-closing inspection terms: _____

42. Flood zone information: _____

43. Well and septic inspection requirements: _____

44. Municipal inspection requirements: _____

Comments: _____

ATTORNEY INFORMATION

Opposing Attorney: _____

Address: _____

Phone: _____ Fax: _____