

# Deed Questionnaire

## CLIENT INFORMATION

Name:  Phone:

Address:

Email:  U.S. Citizen: Y  N

## PROPERTY INFORMATION

Property Address:

County:  Primary Residence (Y/N):  Mortgage or HELOC (Y/N):

Short Term Rental (Y/N):  Long Term Rental (Y/N):

## GRANTOR INFORMATION

Who is the current owner of the property? (choose one)

Individual(s)  Living Trust  Land Trust  Business Entity (LLC, partnership, corporation)

Individual(s): If more than two owners, please use the ADDITIONAL INFORMATION section below.

Owner 1 Name:  Gender:

Address:

Owner 2 Name:  Gender:

Address:

### Living Trust

Trust Name:

Trustee(s):

Address:

**Land Trust**

Trust Name:

Trustee(s):

Address:

**Business Entity**

Name:  State:

Signor:  Title:

Address:

**GRANTEE INFORMATION**

**Who is the person or entity you are transferring the property to? (choose one)**

Individual(s)    Living Trust    Land Trust    Business Entity (LLC, partnership, corporation)

**Individual(s): If more than two owners, please use the ADDITIONAL INFORMATION section below.**

Owner 1 Name:  Gender:

Address:

Owner 2 Name:  Gender:

Address:

**Living Trust**

Trust Name:

Trustee(s):

Address:

**Land Trust**

Trust Name:

Trustee(s):

Address:

## Business Entity

Name:  State:

Signor:  Title:

Address:

## PROPERTY TAX INFORMATION

Address where you would like property tax statements delivered. Please note, this address is on the public record. If you are a Titanium client or have Anderson's Company Assistance Program (CAP) we will provide an address.

CAP?: Y  N

Address:

## DELIVERY

Send my hard copies to this address:

## ADDITIONAL INFORMATION

Please use this space to add additional grantors, grantees, trustees or any other information needed (if any).

## DISCLAIMERS

- By clicking this box, you acknowledge that changing ownership of any business entity associated with this property could result in additional property filing requirements and taxes.
- I agree and acknowledge that the above information is true and correct to the best of my knowledge and authorize Anderson Advisors to draft documents and provide services based on this information. I understand that any incorrect information provided by me, or information that changes after this deed is drafted and/or filed, including but not limited to property information, owner information, or my personal information, may result in processing delays outside the initially quoted time and may incur additional filing fees charged by the county or municipality in which this deed is recorded.
- I acknowledge that deed filing fees are determined by the county or municipality where the deed is recorded and agree and consent to Anderson Advisors charging such fees to the credit card on file.

Name:  Signature:  Date: