

REAL ESTATE INTAKE FORM

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Date	
Referred By	

CLIENT	
Name (Driver License)	
Nicknames	
Email - Personal	
Email - Work	
Phone - Cell	
Phone - Home	
Phone - Work	
Phone - Fax	
Address - Home	
Address - Work	
Client Is Present or Proposed	<input type="checkbox"/> Owner <input type="checkbox"/> Seller <input type="checkbox"/> Buyer <input type="checkbox"/> Landlord <input type="checkbox"/> Tenant <input type="checkbox"/> Neighbor <input type="checkbox"/> Other: _____

PROPERTY	
Address	
County	
Tax Parcel #	
Type	<input type="checkbox"/> House <input type="checkbox"/> Multi-family <input type="checkbox"/> Condominium <input type="checkbox"/> Office <input type="checkbox"/> Retail <input type="checkbox"/> Commercial <input type="checkbox"/> Industrial <input type="checkbox"/> Vacant Land <input type="checkbox"/> Other: _____
Other Information	

LEGAL MATTER	For which of the following is client seeking real estate legal advice?
	<input type="checkbox"/> Sale <input type="checkbox"/> Purchase <input type="checkbox"/> Lease <input type="checkbox"/> Construction <input type="checkbox"/> Easement <input type="checkbox"/> Other: _____

OPPOSING PARTY	
Opposing Party's Name	
Opposing Party's Address	
Opposing Party Is Present or Proposed	<input type="checkbox"/> Owner <input type="checkbox"/> Seller <input type="checkbox"/> Landlord <input type="checkbox"/> Buyer <input type="checkbox"/> Tenant <input type="checkbox"/> Neighbor <input type="checkbox"/> Other
Opposing Party's Attorney (if any)	
Other Information	

BROKER (if any)	
Broker's Name	
Broker's Address	
Broker represents	<input type="checkbox"/> Client <input type="checkbox"/> Opposing Party
Broker's Attorney (if any)	
Other Information	

CLIENT'S ADVISORS (if any)	
	Name and Address
Accountants	
Appraisers	
Insurance Agents	
Engineers and Consultants	
Surveyors	
Other	

EXISTING DOCUMENTS			
	Copy Attached?	Dates	Who Has Original
Listing Agreement - Draft			
Listing Agreement - Signed			
Contract for Sale - Draft			
Contract for Sale - Signed			
Lease Agreement - Draft			
Lease Agreement - Signed			
Real Estate Tax Bills			
Deeds - Drafts			
Deeds - Signed			
Title Insurance Commitments			
Title Insurance Policies			
Surveys			
Closing Documents - Drafts			
Closing Documents - Signed			
Other Documents			

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