

Home Equity Leverage Program

DONOR PROFILE FORM

Pacific
Sotheby's
INTERNATIONAL REALTY

About You

NAME

DATE

REFERRING PARTY (check if same as above)

BUSINESS NAME

TEL. WORK

TEL. CELL

EMAIL

About the Client / Donor

NAME (first, m., last)

D.O.B.

SPOUSE (if appl.)

D.O.B.

THIS CLIENT PREFERS TO (please check):

- REMAIN IN THE PROPERTY
- LEASE/RENT THE PROPERTY
- BENEFIT FROM IMMEDIATE SALE OF PROPERTY BY THE NON-PROFIT

NOTES

About the Prospective Property to be Gifted

STREET ADDRESS

CITY, STATE

ZIP

EST. VALUE \$

PURCHASE PRICE \$ PURCHASE YEAR

TOTAL DEBT \$ n/a

1ST TRUST DEED \$ n/a

2ND TRUST DEED \$ n/a

OTHER LIENS \$ n/a

NOTES

Submitting for Initial Evaluation (there is no obligation)

REQUIRED ATTACHMENTS: CURRENT MORTGAGE STATEMENT PROPERTY TAX BILL

Please scan all and email completed form to: Tom Di Noto at tom.dinoto@pacificsir.com and copy Sheila VanLondersele Godkin at sheila.godkin@pacificsir.com. Thank you.