

# PROPERTY WORKSHEET

Address: \_\_\_\_\_  
Annual Property Taxes: \$ \_\_\_\_\_ Purchase Date \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_  
County: \_\_\_\_\_ HOA Dues \$ \_\_\_\_\_

## OWNERS

Owner #1 Name (Print): \_\_\_\_\_ Birth Date: \_\_\_\_\_  
SSN: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Owner #2 Name (Print): \_\_\_\_\_ Birth Date: \_\_\_\_\_  
SSN: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Description: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Description: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Description: \_\_\_\_\_  
Phone #: \_\_\_\_\_ Description: \_\_\_\_\_

## MORTGAGE(S)

Mortgage Company Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
PIN #: \_\_\_\_\_ Fixed or Variable: \_\_\_\_\_ Payment Amount: \$ \_\_\_\_\_

Balance: \_\_\_\_\_ Tax & Ins Escrow? \_\_\_\_\_ Prepay Penalty? \_\_\_\_\_

2<sup>nd</sup> Mortgage Company Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
PIN #: \_\_\_\_\_ Fixed or Variable: \_\_\_\_\_ Payment Amount: \$ \_\_\_\_\_

Balance: \_\_\_\_\_ Tax & Ins Escrow? \_\_\_\_\_ Prepay Penalty? \_\_\_\_\_

## HAZARD INSURANCE

Company: \_\_\_\_\_ Policy #: \_\_\_\_\_ Cost: \$ \_\_\_\_\_  
Telephone: \_\_\_\_\_ Agent's Name: \_\_\_\_\_ Agent's Phone: \_\_\_\_\_

## UTILITY SUPPLIERS

Electric: \_\_\_\_\_ Gas: \_\_\_\_\_

Water: \_\_\_\_\_ Trash: \_\_\_\_\_  
Cable: \_\_\_\_\_

## SCHOOLS

Elementary: \_\_\_\_\_  
Middle: \_\_\_\_\_  
Junior High: \_\_\_\_\_  
High: \_\_\_\_\_

## PHYSICAL INFORMATION

Bedrooms: \_\_\_\_\_ Baths: \_\_\_\_\_ # of Floors: \_\_\_\_\_ Year Built: \_\_\_\_\_ # of Owners: \_\_\_\_\_  
Outside Surface (Brick, Wood Siding, Vinyl Siding, Stucco, etc): \_\_\_\_\_  
Square Footage: \_\_\_\_\_ Amount of Land: \_\_\_\_\_

## LIENS & ENCUMBRANCES

Excluding the 1<sup>st</sup> and 2<sup>nd</sup> mortgages, please describe any and all liens or other encumbrances on your property. Include the name of the lien holder, the amount of the lien, the terms of the lien and the required payments (if any) and payment schedule. If the lien is a result of legal action, please describe the situation and the current status of the action.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## IMPROVEMENTS REQUIRED

Rodents/Pests? \_\_\_\_\_  
Electrical? \_\_\_\_\_  
Heating/Air? \_\_\_\_\_  
Roof? \_\_\_\_\_  
Plumbing? \_\_\_\_\_  
Paint? \_\_\_\_\_  
Carpet? \_\_\_\_\_  
Kitchen \_\_\_\_\_  
Baths \_\_\_\_\_  
Landscape \_\_\_\_\_  
Foundation \_\_\_\_\_  
Drive way \_\_\_\_\_

## NOTES

(Parks, entertainment, interstate access, hospitals, grocery stores, restaurants, churches, HOA features, shopping centers, etc.)

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