

Real Estate Department Property Transaction Assistance Request

For
Real Estate Department
Use Only

Parish Name: _____

Address: _____

Phone: _____ FAX: _____

E-Mail: _____

Pastor/Parish Administrator: _____

Primary Contact (If other than above): _____

Date Received:

Received by:

TRANSACTION TYPE (check one)

- Sale of Real Property**
- Land Only
- Land and Improvements
- Purchase of Real Property** (detail information on page 3)
- Land Only
- Land and Improvements
- Other**
- Letter of Intent Option Agreement Right of First Opportunity
- Lease of Parish Property** (detail information on page 2)
- Building or Portion of Building Described as: _____
- Vacant Land or Parking Area Described as: _____
- Lease of Non-Parish Property for Parish Use** (detail information on page 2)
- Building or Portion of Building Described as: _____
- Vacant Land or Parking Area Described as: _____
- Square Feet of Leased Property or Acreage of Vacant Land: _____

Please attach a diagram of the lease premises in relation to the entire property where located.

INFORMATION FOR ABOVE REFERENCED TRANSACTION:

Property Address (Include Street Number, City, Zip Code, and County):

Buyer/Seller, Landlord – Lessor, or Tenant – Lessee: (Required)

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ FAX: _____ E-mail: _____

Current Use of Property: _____

Proposed Use of Property by this Tenant: _____

Are any business licenses required for the proposed use? Yes No **If so, please provide a copy of each.**

Estimated Current Value of Property: \$ _____

FOR LEASE/RENTAL OF PROPERTY and USER/LICENSE AGREEMENTS:

Leasehold Status:

New Renewal Assignment/Transfer Termination

Security Deposit: \$ _____ **Annualized Rent:** \$ _____

Lease Term: _____

Term Commences: _____

Rent To Be Paid: Monthly Quarterly Annually

Will this Tenant have sole use and occupancy of the entire building where the leased premises are located? Yes No

Utilities to be Paid By: Landlord Tenant

With respect to: **Gas and Electric** _____

Water and Sewer _____

Other (please specify): _____

Maintenance and Repair Obligations (please describe): _____

Insurance Responsibility: Landlord Tenant

Property Taxes (if any): Landlord Tenant

Is prospective tenant: a non-profit entity an individual
 A for-profit organization a Church-related group

Are there other tenants leasing a part of the property: Yes No

If so, please identify each and the amount of annual rent they pay: _____

Additional Information: _____

(Please go to Page 4 - Miscellaneous Section)

FOR PURCHASE/ SALE OF REAL PROPERTY

Do you have PFRC/ Archbishop Approval? Yes No

Due Diligence Data (information on hand and ready to be forwarded to Real Estate Department):

- Survey or Improvement Location Certificate**
- Inspection Report**
- Environmental Assessment:**
 - Asbestos Evaluation/ Abatement
 - Phase I Site Assessment
 - Title Commitment or Policy**
 - Structural Engineering Report**
 - Mold Investigation/ Remediation
 - Other (i.e. lead paint, underground storage tanks, hazardous materials, etc.)

Flood Plain Status: _____

Current Property Tax Status: Exempt Taxable

Assessed Value Per County Property Records: \$ _____

Prior Year's Taxes (if applicable): \$ _____

Utilities Available at Site: Gas Electric
 Water Sewer

Appraisal: Date _____ Value \$ _____

Current Zoning: _____

Zoning Necessary for Proposed Use: _____

Contact Information for Zoning Authority: _____

Address: _____

City: _____ **Phone:** _____

E-Mail: _____

Additional Information: _____

(Continue to page 4)

FINANCIAL FACTS

Amount of Earnest Money Required: \$ _____

Total Amount of Cash Necessary to Close: \$ _____

Total Amount of Cash Now Available: \$ _____,

And On Deposit at: _____

And On Deposit at: _____

Loan Required in the Amount of: \$ _____

Approved and in Process: Funding Date _____

Submitted and Currently pending Approval on: _____

Application Not Yet Complete But Expected to be Complete on: _____

MISCELLANEOUS:

Broker/ Real Estate Agent Involved in Transaction

Representing: Buyer or Tenant Seller or Landlord

Will a Commission be Payable? Amount \$ _____ Percentage: _____

Has this Proposed Transaction Been Reviewed/ Authorized by:

Parish Council Parish Finance Council

If not, when will these councils become involved? Date _____

Names and Contact Information for Parishioners who are Assisting with this Transaction, or Parish Personnel Directly Involved: *(Please Attach Separate Sheet, or note below)*

Other Information and Comments: _____

Time Table Preferences (if feasible for Chancery staff): _____
