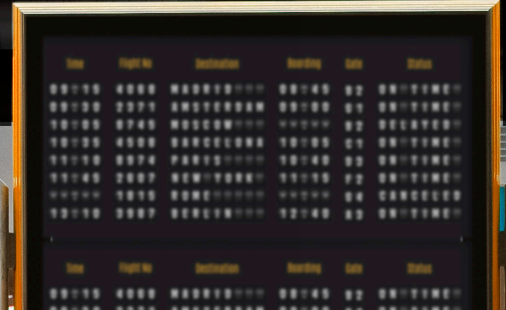


Asset Donation Form Real Estate

To help your NCF team evaluate the giving potential of a specific complex asset, please answer all applicable sections (indicate N/A otherwise.)



GIVER INFORMATION

Giver

Title _____ First Name _____ Initial _____ Last Name _____

Email _____ Date of Birth _____

Preferred Method of Contact *(Check one)*

Email Home Ph. Bus. Ph. Mail Cell

Notice address

Address: Including P.O. Box, street address, suite or apt #

City _____ State _____ Zip _____

Home Phone _____ Business/Cell _____ Fax _____

NCF Giving Fund Name (if none, please open at NCFgiving.com)

NCF Giving Fund Number _____

Spouse, if giving jointly

Title _____ First Name _____ Initial _____ Last Name _____

Email _____ Date of Birth _____

Preferred Method of Contact *(Check one)*

Email Home Ph. Bus. Ph. Mail Cell

Tax information

Effective Federal Tax Rate: _____ % State Tax Rate: _____ %

Giver's Estimated Adjusted Gross Income (AGI)

NCF contact name/local office

Advisor contact: In order to provide you with an exceptional gifting experience, we may need to speak with your advisors on various tax matters related to your gift. When necessary, NCF's Tax Compliance Department will either contact you for further information, or you may request that we contact your advisors directly for assistance.

May we contact your professional advisor, if necessary? Yes No

CPA Contact Information (Name, Email Address, Phone)

Legal Contact Information (Name, Email Address, Phone)

Financial Contact Information (Name, Email Address, Phone)

NCF recommends that all complex asset givers seek and obtain their own independent tax and legal counsel.

PHONE 800 681 6223 FAX 866 683 5089 WEB ncfgiving.com

TIMING

What is the deadline for completing the gift? _____

Please note our illustrations will show tax efficiency based on the charity receiving the gift prior to any binding agreements being executed.

Is this Property currently being marketed for sale?

Yes No I'm not sure

If yes:

Do you anticipate the Property selling within 6 months?

Yes No I'm not sure

Have any potential buyers been identified?

Yes No I'm not sure

Do you have a broker? Yes No If yes, please list name below

Are any of the potential buyers one of the following?
(Check all that apply)

Family member Tenant Unrelated Party

Name and Contact Phone Number

PROPERTY INFORMATION

Address: Including P.O. Box, street address, suite or apt #

City

State

Zip

County

What percentage of the Property do you own?

_____ %

What percentage of the Property do you want to give?

_____ %

What is the current estimated fair market value (FMV) of the Property? _____

How is the FMV derived? Appraisal Estimate Other

What is your adjusted income tax basis in your ownership of the Property?

If unknown, please list an estimate and consult your tax advisor. _____

Approximate annual cost to maintain the property: Taxes _____ Insurance _____

Owners Association Fees _____ Other _____

Approximate number of acres _____ Vacant land (no structures) Yes No

How do you own the Property? In your individual name In a trust In a holding company

How is the owner listed on the deed: _____

Property use: Agricultural Leased Building (s) Vacant Lot Other

If leased:

If leased, will the tenant still occupy the Property at the time of the gift? Yes No

Is there a third party Management Agreement? Yes No

If yes, will the Property Manager continue after the gift is made? Yes No
(NOTE: we cannot pay a related party to manage the Property)

If no, are you willing to act as the Manager? Yes No

Do you have a mortgage on the Property? Yes No

If yes:

What is the estimated amount of the mortgage? _____

Was the debt obligation incurred more than 5 years ago? Yes No I'm not sure

What is the amount of total debt that is over 5 years old? _____

INITIAL DOCUMENTS NEEDED

Who should we contact to provide the following information?

Contact Information (Name, Email Address, Phone)

- Owner's Form K-1 or Schedule C
- Owner's Tax Return

NEXT STEPS

Once you decide to move forward in making your complex gift, we will need the following to complete our due diligence. (NOTE: We use these documents to identify legal requirements to transfer the Property.)

- Phase 1 environmental report without any Recognized Environmental Conditions (generally not required for single family dwellings under 5 acres.) If a report already exists, we will need a Reliance Letter from the environmental engineer.
- Title Insurance report if applicable
- Copy of the current Property and Casualty Insurance Policy (if improved) and Commercial General Liability (if vacant land)
- Most recent property tax bill (taxes must be paid at the time of gift)
- Covenants, Conditions & Restrictions Agreements (if any)
- Lease Agreements (if any)
- Certificate of Insurance (if applicable)
- Rent Roll (if applicable)

NEXT STEPS Continued

- Property Management Agreement (if any)
- Recent appraisal/valuation or real estate comp (if available)
- Copy of the deed including legal description
- If held in a trust or holding company, please provide the applicable trust instrument or holding company's organization documents, potentially including Articles, Bylaws, Operating Agreement, Partnership Agreement or other similar document.

Would you like to use DocuSign for gift completion? Yes No

If yes, we will be reaching out for email addresses of all required signers.

Please email these documents to your NCF contact.