

# Asset Donation Form Holding Company of Real Property

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

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Email Date of Birth

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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 #

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City State Zip

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Home Phone Business/Cell Fax

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NCF Giving Fund Name (if none, please open one at [ncfgiving.com](http://ncfgiving.com))

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NCF Giving Fund Number \_\_\_\_\_

### Spouse, if giving jointly

Title First Name Initial Last Name

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Email Date of Birth

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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): \_\_\_\_\_

### Your NCF contact name and local office

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If Giver is an Entity or Trust, please complete:

Name of Entity or Trust

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### Your advisors

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

If yes, please list his/her contact information below

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Name, Email Address, Phone

## 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 Company or Property currently being marketed for sale?  
Yes  No  I'm not sure

### If yes:

Do you anticipate the Company or Property selling within 6 months? Yes  No  I'm not sure

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

Have any potential buyers been identified?  
Yes  No  I'm not sure

Family member  Tenant  Unrelated Party

## GIFTED ASSET INFORMATION

Holding Company Name \_\_\_\_\_

Is the Real Estate the only asset in the Company? Yes  No  If no, please list other assets in the Company:  
\_\_\_\_\_

What percentage of the Company do you own? \_\_\_\_% What percentage of the Company do you want to gift? \_\_\_\_%

How long has the Entity owned the Property? \_\_\_\_\_

What is the current estimated fair market value (FMV) of the Company? \_\_\_\_\_

How is that FMV derived? Appraisal  Estimate  Other

What is your adjusted income tax basis in your ownership of the Company? \_\_\_\_\_

If unknown, please list an estimate and consult your tax advisor: \_\_\_\_\_

## PROPERTY INFORMATION

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

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?

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Contact Information (Name, Email Address, Phone)

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

## NEXT STEPS

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

### Ownership documents

If the owner is an Entity, please provide:

- Articles, and
- Either the Operating Agreement (LLC), Bylaws (C or S Corp), or the Partnership Agreement (Limited Partnership or General Partnership)

If the owner is a Trust, please provide the Trust instrument.

### Company's governance documents and financials

- (LP | S.Corps | LLC)
- Articles of Formation | Corporation | Organization plus amendments
- Partnership Agreements | Bylaws | Operating Agreement plus amendments
- Financial Statements (if not previously provided)
- Tax Return (1065) or 1120S | Owner's K-1 (if not previously provided)
- Subscription Agreement (if any)
- Cap Table

### Property documents

- Deed including legal description
- Current Insurance
- Lease Agreements (if any)
- Management Agreements (if any)
- Phase 1 Report(s) (if any)