



# Real Estate Disclosure

Thank you for taking a few minutes to complete this form, your first step to make your giving easier, more strategic and more meaningful. Additional forms are available at [www.nptrust.org](http://www.nptrust.org). If you need assistance, call toll free at (888) 878-7900 or send an email to [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Donor Information

Identify all registered owners of the assets being donated. If the donor is a trust, enter the name of the trust agreement, the taxpayer identification number, and the date of the trust agreement directly below.

### Trust/Legal Entity

(a completed Certificate of Authority for Trusts must accompany all initial gifts from trusts.)

\_\_\_\_\_  
Name of Legal Entity

\_\_\_\_\_  
Taxpayer ID #

\_\_\_\_\_  
Trust Date (month/day/year)

### Individual(s)

Mr.  Mrs.  Ms.  Dr.

\_\_\_\_\_  
First Name, MI, Last Name

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security #

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Email

\_\_\_\_\_  
Primary Telephone #

## 2. Property Description

### Ownership Form

Personal  Partnership  JTWRS  C Corporation  Tenants in Common

LLC  Sole Proprietorship  Trust

## Property Location

Street Address	
City/State/Zip	
Brief Description	

## Property Details

Please answer the following questions within the framework provided, if possible. If, however, you do need to provide further explanation, please attach separately.

Land Area (acres or sq. ft.)	
Building area	
Property insurance provider	
Year of acquisition	
Principal balance of mortgage	
Current fair market value	
Assessed tax value	
Real estate taxes	
Fiscal tax year	
Use of property	<input type="checkbox"/> Residential <input type="checkbox"/> Commercial <input type="checkbox"/> Retail <input type="checkbox"/> Office <input type="checkbox"/> Vacant Land <input type="checkbox"/> Storage <input type="checkbox"/> Other (Please describe) _____
How is the property currently zoned?	
By what governmental body?	

The current use is conforming or non-conforming?	
Utilities: (check all that are currently servicing the property)	<input type="checkbox"/> Water <input type="checkbox"/> Phone <input type="checkbox"/> Drainage <input type="checkbox"/> Sanitary Sewer <input type="checkbox"/> Electricity <input type="checkbox"/> Gas <input type="checkbox"/> Cable <input type="checkbox"/> Other (Please describe) _____
Is the property vacant? If yes, how long has it been since seller or a tenant occupied?	
Are there any leases, written or verbal, on Property or any part thereof?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any underground tanks or toxic substances on Property, or adjacent properties, (structure or soil) such as asbestos, polychlorinated biphenyls (PCBs), urea-formaldehyde, methane gas, radioactive material, radon, benzene or others?	<input type="checkbox"/> Y <input type="checkbox"/> N
Has the property been tested for radon or any other toxic substances?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of the presence of Lead-Based Paint?	<input type="checkbox"/> Y <input type="checkbox"/> N
If residential, was any part of the residential dwelling on Property constructed before 1978?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are there improvements located on filled or expansive soil, or are there foundation, structural, or soil problems on the Property (including the driveways and the parking areas)?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are there any burial pits, mineshafts, wells (in use or abandoned) or landfills (other than foundation backfill) on Property?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any sliding, settling (other than normal settling), earth movement, sinkholes, upheaval, or earth stability/expansive soil problems?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any diseased, fallen or dead trees or shrubs?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any encroachments, unrecorded easements, or boundary line disputes with respect to the Property?	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you have any knowledge of any past or present damage to Property caused by infiltrating pests, termites, dry rot, or other wood-destroying organisms?	<input type="checkbox"/> Y <input type="checkbox"/> N
Is any part of the Property situated in a flood zone or wetlands area?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any mold appearing on interior portions of any dwelling on the property other than on the walls, floors or ceilings of showers/bathtubs?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are there any endangered plants or wildlife located on the property?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are there any easements or agreements (including public or private utilities and sewers) under or over the Property? If yes, please attach survey:	<input type="checkbox"/> Y <input type="checkbox"/> N

Are you aware of any additions, structural changes, or any other major alterations or improvements to the Property?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any instances where necessary permits and/or approvals were not obtained? If yes, please attach explanation:	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any work done to the Property that did not comply with building codes or zoning regulations?	<input type="checkbox"/> Y <input type="checkbox"/> N
Do you know of any violations of Deed Restrictions affecting the Property?	<input type="checkbox"/> Y <input type="checkbox"/> N
Is the Property located in an area where public authorities are contemplating proceedings for freeway, thoroughfare, rail or utility construction, a redevelopment project, street widening or lighting, or other similar public projects?	<input type="checkbox"/> Y <input type="checkbox"/> N
Are you aware of any change in zoning that is pending or threatened?	<input type="checkbox"/> Y <input type="checkbox"/> N

### Physical Condition

Check all places where there is a defect of needed repair (other than normal periodic maintenance)

- |  |   |
|--|---|
| <input type="checkbox"/> Electrical systems and equipment              | <input type="checkbox"/> Parking areas and driveways                    |
| <input type="checkbox"/> Exterior walls                                | <input type="checkbox"/> Plumbing systems, drains and sprinkler systems |
| <input type="checkbox"/> Floors  | <input type="checkbox"/> Roof   |
| <input type="checkbox"/> Foundation                                    | <input type="checkbox"/> Structural components                          |
| <input type="checkbox"/> Lawn, landscaping and planters                | <input type="checkbox"/> Windows, doors, plate glass, skylights         |
| <input type="checkbox"/> Mechanical including A.C. & heating equipment | <input type="checkbox"/> Other (Please Describe)                        |

### Other Information

Is there any information that should be disclosed that has not been covered by the questions above?  Y  N  
(If "yes", please describe below and/or attach)

### 3. Acknowledgement of Terms (All donors or trustees named in Section 1 must sign below)

I hereby represent that I have carefully completed and reviewed all of the information on this Real Estate Disclosure Statement, and to the best of my knowledge, all of such information is true and correct, including the attached Legal Description and other attachments. I have included in this Statement all material facts concerning the physical condition or value of the Property of which I have knowledge. I will inform National Philanthropic Trust of any material change concerning the Property, which may arise before or during the term or extension of any agreements or any sales contracts. Any material misstatement of fact, whether by commission or omission, will serve as grounds to void any agreement between National Philanthropic Trust and the Donor(s). National Philanthropic Trust is hereby authorized to disclose the foregoing information to the public.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

### 4. Return this completed form by mail or fax to:

National Philanthropic Trust | 165 Township Line Road, Suite 150 | Jenkintown, PA 19046 | Fax: (215) 277-3029