



If you have reviewed the Real Estate Contribution Guidelines and are interested in funding your NPT donor-advised fund (DAF) with a gift of real estate, please provide the following documentation to NPT for purposes of its due diligence.

General

- The Real Estate Disclosure form completed in its entirety and signed
- A copy of the deed
- Copies of any easements on the property
- Recent title report
- Most recent appraisal of the property
- Copy of any inspection report in the donor's possession
- Zoning report for the property
- Certificates of insurance for all insurance on the property
- List of all insurance claims with respect to the property made over the most recent 3 years
- Phase I environmental assessment for the property

Carrying Costs

- Documentation of the current assessed value of the property for property tax purposes
- Copies of all property tax bills for the most recent calendar year
- Copies of most recent bills for any other taxes or assessments against the property including, without limitation, from school districts or other special taxing districts, business improvement districts, condominium or homeowner associations
- List of all recurring utility and other bills for the property that will need to be maintained following the transfer to NPT (e.g. water, electricity, gas, landscaping, cleaning services), copies of the most recent bills, and an estimate of the annual cost for each service or utility
- Copies of all service, maintenance, management or other contracts with vendors for the property
- If the property is tenanted, copies of all active leases and amendments, along with a current rent roll

Entity Documents

If the property is owned by an entity, provide the following documents for the entity:

- If owned by a trust, the Agreement of Trust
- Articles/Certificate of Incorporation or Certificate of Formation
- Bylaws
- Shareholder, Operating or Partnership Agreement
- Any other governing documents or agreements that affect the entity's ability to transfer the property (if the entity will be the donor) or NPT's ownership of the entity (if the entity is being transferred to NPT)