



**Haverford
College**

OFFICE OF GIFT PLANNING

Part I—Real Estate Review and Questionnaire

(To be completed by current owner of property)

1. Legal description and location of the property:*

2. Name, address and social security number of present property owner:

3. What is the property's approximate present value? Describe basis for estimate.

4. Is the property encumbered? If yes, indicate amount of unpaid mortgage or lien.

5. Is there a current tenant lease arrangement involved with the property? If so, state length and guidelines of lease.

6. Has an appraisal been prepared within the last six months?

7. Are all taxes, covenant fees, and maintenance expenses up-to-date? (List the amounts of annual taxes and other fees attached to the property.)

*Examples of description: "160 acre farm in Chester County, PA, 3 miles southeast of West Chester, PA"; or two-story commercial building in Reading, PA, or eight-unit apartment building in Philadelphia, PA.

8. Is the property “marketable”? (i.e., can the donor give examples of recent comparable sales). If so, state brief explanation and description of comparable sales.

9. Is the property owned jointly with other individuals (not including spouse)?

10. Does the property currently produce income? If yes, indicate the specific source and amount.

11. Has the property been on the market at any time during the last year? (If yes, indicate dates, offering price(s), and name and address of representing agent.)

12. When and how did the donor acquire property, and what is its adjusted basis?*

13. Are there any problems unique to the property that have not been discussed? (i.e., zoning questions, neighbor disputes, property upkeep, controversial development planned for the area, etc.) If so, please briefly state those concerns and indicate current zoning classification.

* “Adjusted basis” is the Donor’s “tax cost” in the event of sale of the property. Usually this is:

Start with	(1)	original purchase price
Add	(2)	cost of improvements
Subtract	(3)	depreciation claimed while owned
Equals	(4)	adjusted basis.

Part II—Preliminary Environmental Review

(To be completed and signed by current owner)

1. Describe present use of the property:

2. Describe previous use of the property over the past 50 years (attach separate sheet if needed):

3. Names of former property owners over the past 50 years (attach separate sheet if needed):

4. Describe present and previous uses of immediately adjacent property:

5. Asbestos
 - a. Is asbestos currently present in any of the structures?

 - b. If asbestos is present, has a survey been made to assess the type, amount, location and condition of the asbestos? (If so, attach a copy of the survey.)

 - c. Have asbestos air samples been taken? If so, what were the results?

6. Polychlorinated Biphenyls (PCBs)
 - a. Have PCBs been used in electrical transformers, capacitors, or other equipment on the property?

 - b. If so, describe the use and quantity of PCBs used on the property.

7. Fuel/Chemical Storage Tanks, Drums, and Pipelines

- a. Are there any above ground or underground gasoline, diesel, fuel oil, or other chemical storage tanks or pipelines on the property?
- b. If so, describe substances stored, capacity of tank(s), and use of any pipelines.
- c. Have the tanks and/or pipelines been inspected or tested for leakage? When was the most recent test? What were the results?
- d. Are any other chemicals stored on the property in drums or other containers? If so, please describe the substances, quantities stored, and types of containers.
- e. Have there been any spills, leaks, or other releases of chemicals or petroleum products on the property? If so, describe the chemicals or petroleum products and quantities released; any cleanup measures taken; and the results of any soil or groundwater samples performed to detect the presence of the chemicals or petroleum products spilled, leaked or released on the property.
- f. Attach copies of any permits or licenses pertaining to the use, storage, handling, or disposal of chemical or petroleum products on the property.

8. Air Emissions/Radon Gas

- a. Describe air emissions from each source of air pollutants, including fuel burning equipment on the property. Describe type of fuel burned.
- b. Describe air pollution control equipment used to reduce emissions for each source of air pollutant.
- c. Are air emissions monitored? If so, indicate frequency of monitoring
- d. Attach copies of any air permits or licenses pertaining to operations on the property.
- e. Have tests to determine the existence of Radon gas been performed? When? Results? Attach copy of test reports.

9. Water Discharges

- a. List all sources of waste water discharges to surface waters, septic systems, or holding ponds:
- b. List all sources of waste water discharges to public sewer systems:
- c. For each discharge list the average daily flow:
- d. Attach copies of any water discharge permits or licenses pertaining to operations on the property.

10. Waste Disposal

- a. Describe the types of liquid wastes (other than waste water described in Part II above) and solid wastes generated at the property.
- b. Describe how the liquid and solid wastes generated at the property are disposed.
- c. Attach copies of any waste disposal permits or licenses pertaining to operations on the property.

11. If the property has been or is used for industrial purposes, provide the following additional information.

- a. Has the property been used for disposal of any liquid or solid waste? If so, describe the location of all disposal sites; the type of wastes disposed at each site; the results of any soil or groundwater samples taken in the vicinity of each site; and the manner in which each site not presently in use was closed.
- b. Have evaporation or storage ponds been located on the property? If so, describe the location of all ponds; the type of wastes placed in each pond; the results of any soil or groundwater samples taken in the vicinity of each pond; and the manner in which each pond not presently in use was closed.
- c. Have waste water treatment facilities, such as acid neutralization vaults, been located on the property? If so, describe the location of all facilities; the type of wastes treated in each facility; the results of any solid or groundwater samples taken in the vicinity of each facility; and the manner in which each facility not presently in use was closed.

- d. Are there raw chemical or waste chemical storage areas on the property? If so, please describe the location of all such areas, the type of products or wastes stored in each area; the results of any soil or groundwater samples taken in the vicinity of each area; and the manner in which each area not presently in use was closed.
12. Provide the following additional information if the property has been or is used for agricultural purposes:
- a. Have pesticides, herbicides, or other agricultural chemicals been applied to the property? If so, describe the location where such pesticides, herbicides, or chemicals were applied; the type of pesticides, herbicides or chemicals applied in each area; and the results of any soil or groundwater analyses performed to detect pesticides, herbicides, or chemical used at the site.
 - b. Have pesticides, herbicides, or other agricultural chemicals been mixed, formulated, rinsed, or disposed of on the property? If so, describe the locations where such pesticides, herbicides, or chemicals were mixed, formulated, rinsed, or disposed of; the type of pesticides, herbicides, or chemicals mixed, formulated, rinsed, or disposed of at each location; and the results of any soil or groundwater analyses performed to detect pesticides, herbicides, or chemicals mixed, formulated, rinsed, or disposed of at the site.

As the present owner of the property or as an officer or a general partner of the present owner of the property (or the duly authorized representative of such owner), I am familiar with all of the operations presently conducted on the property, have made a diligent inquiry into the former uses of the property, and hereby certify to and for the benefit of any purchaser of the property that, to the best of my knowledge, information and belief, the information disclosed above is true and correct.

(Signature)

(Title)

(Date)