

THE POCKET LAWYER[®]

Document Preparation Service

/// Workbook ///

✍️ “We Help You Help Yourself” ✍️

QUIT CLAIM, WARRANTY and GRANT DEEDS



PART “A”

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Document Preparation Service Workbook

“Self-Help” Series

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The **POCKET LAWYER**[®] Document Preparation Service

Deed Client Questionnaire

INSTRUCTIONS: Answer All questions with an answer or a N/A. Today's date _____
 If more space is needed, use the space below or attach blank pages.

INFORMATION ABOUT THE OWNER(S) (Known as Grantors)

Provide the name of the current owner(s) of the property exactly as shown on the deed where the current owners acquired the property.)

1	First Name (Owner)			
2	Middle Name (Owner)			
3	Last Name (Owner)			
4	Street address			
5	City	County	State	Zip
6	Mailing address (if different) Street/ PO			
7	City	County	State	Zip
8	Home phone		Business phone	
9	First Name (Second Owner)			
10	Middle Name (Second Owner)			
11	Last Name (Second Owner)			
12	Street address			
13	City	County	State	Zip
14	Mailing address (if different) Street/ PO			
15	City	County	State	Zip
16	First Name (Grantee)			
17	Middle Name (Grantee)			
18	Last Name (Grantee)			
19	Street address			
20	City	County	State	Zip
21	Mailing address (if different) Street/ PO			
22	City	County	State	Zip
23	First Name (Second Grantee)			
24	Middle Name (Second Grantee)			
25	Last Name (Second Grantee)			
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Deed Client Questionnaire (continued)				
26	City	County	State	Zip
27	Mailing address (if different) Street/ PO			
28	City	County	State	Zip
If additional space is needed, number and insert below.				
	PROPERTY INFORMATION			
	<i>(Information about the Property that is being transferred or conveyed)</i>			
29	Street Address			
30	City	County	State	Zip
31	County Tax Parcel # <i>(include copy of current tax bill, if available):</i>			
32	Recorder lot and block number <i>(if known):</i>			
33	Description of property as stated on previous deed <i>(if known) (attach copy of deed, if available):</i>			
34	Type of property: <input type="checkbox"/> Vacant land <input type="checkbox"/> Land and house <input type="checkbox"/> Land and commercial building			
35	Date deed is to be effective:			
36	Select the type of deed you want to use: <input type="checkbox"/> Quitclaim Deed <input type="checkbox"/> Grant Deed <input type="checkbox"/> General Warranty Deed <input type="checkbox"/> Special Warranty Deed <input type="checkbox"/> Trust Deed <input type="checkbox"/> Reconveyance Deed <input type="checkbox"/> Gift Deed			
37	If there are two Owners, are they husband and wife? <input type="checkbox"/> Yes <input type="checkbox"/> No			
38	Are any of the Owner(s)' name(s) different know then on the original deed? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain:			
39	Is the property in a 'community property' state? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, which state? <input type="checkbox"/> Arizona <input type="checkbox"/> California <input type="checkbox"/> Idaho <input type="checkbox"/> Louisiana <input type="checkbox"/> Nevada <input type="checkbox"/> New Mexico <input type="checkbox"/> Texas <input type="checkbox"/> Washington <input type="checkbox"/> Wisconsin			
40	Select ONE of the following if there are more than <u>one</u> Grantee: <input type="checkbox"/> Tenancy by the Entirety (only for married Grantees) <input type="checkbox"/> Joint Tenancy <input type="checkbox"/> Tenancy in Common. If the Grantee chooses a Life Estate, you must indicate who the remainderman is: <i>(specify)</i>			
	TRANSFER INFORMATION (For calculating County and State Documentary Transfer Tax)			
41	The following is a list of real estate transactions that are exempt from the Documentary Transfer Tax. Check any box that applies:			
42	<input type="checkbox"/> Conveyances Confirming Title in Grantee			

Deed Client Questionnaire (continued)	
If additional space is needed, number and insert below.	
43	<input type="checkbox"/> Conveyances in Dissolution of Marriage
44	<input type="checkbox"/> Conveyances to Secure a Debt
45	<input type="checkbox"/> Reconveyances Upon Satisfaction of a Debt
46	<input type="checkbox"/> Conveyances Transferring Interests into or out of a Living Trust
47	<input type="checkbox"/> Conveyances Changing Manner in Which Title is Held
48	<input type="checkbox"/> Court Ordered Conveyances Not Pursuant to Sale
49	<input type="checkbox"/> Conveyances Given For No Value
50	<input type="checkbox"/> Conveyances to Establish Sole and Separate Property of a Spouse
51	<input type="checkbox"/> Conveyances to Confirm a Community Property Interest when property was purchased with Community Property Funds
52	<input type="checkbox"/> Conveyances to Confirm a Change of Name
53	<input type="checkbox"/> Conveyance of An Easement or Oil and Gas Lease Where the Consideration and Value is Less Than \$100
54	<input type="checkbox"/> Conveyances Where the Liens and Encumbrances Are Equal or More Than the Value of Property, and No Further Consideration is Given
55	<input type="checkbox"/> Conveyances From a Trustee Under a Land Contract at the Consummation of the Contract
56	<input type="checkbox"/> Conveyances From Individual(s)/ Legal Entity(ies) to Individual(s)/ Legal Entity(ies) Where the Grantors and Grantees Are Comprised of the Same Parties, and Parties Continue to Hold the Same Proportionate Interest
57	<i>The County assesses a Documentary Transfer Tax on the consideration or value of the real property equity at the rate of 55 cents per \$500, rounding up to the highest \$500. Also some cities impose additional taxes. Specify the city where the real property is located:</i>
ACKNOWLEDGEMENT and SIGNATURE	
<p>I (We), acknowledge that the information provided by me in this Workbook is true and accurate to the best of my knowledge. I further acknowledge that I am going to do my own Deed and want the POCKET LAWYER® Document Preparation Service to assist me by performing certain document preparation services, according to my instructions. I will be solely responsible for the information contained in these documents and will have the opportunity to review the completed documents before they are filed. I understand that the POCKET LAWYER Document Preparation Service does <u>not</u> render legal advice or legal services and is acting solely at my direction and pursuant to my decisions. I further understand that I have the right to handle my own legal matters and act as my own attorney, but that the advice of an attorney may be necessary. The POCKET LAWYER Document Preparation Service encourages attorney participation and will provide a list of attorney referrals, at my request.</p> <p>I hereby relieve the POCKET LAWYER Document Preparation Service from any liability whatsoever, regarding this deed preparation, and agree to hold them harmless from any damages I may suffer and understand that my sole relief is limited to the return of any fee paid for the preparation of these documents.</p>	
Signature	Date
Print name	
Signature	Date
Print name	
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