



Preliminary Terms of Sale & File Cover Sheet

Property_____

☐SFR ☐Condo/PUD ☐Income ☐REO ☐Short Sale ☐Probate

Client(s)_____ ☐Buyer(s)

_____ ☐Seller(s)

Phone 1 _____ Phone 2 _____

Phone 3 _____ Phone 4 _____

Email _____ Email _____

Co-Op Office _____

Office Phone # _____

Agent _____

Agent Phone # _____

Agent email _____

Co-Op’s Client(s): _____

Title Co._____ **Escrow #** _____

Officer_____ **Phone #** _____

Email _____ **Fax #** _____

Lender _____ Agent _____

Email _____ Phone # _____

Financial Disclosure (if owner carry) []

Insurance _____ Agent _____

Email _____ Phone # _____

Sales Price _____ **Deposit** _____

Est. COE _____ Increased (RID-11) _____

Commission to BHR _____ to Co-op _____

Referral Fee (complete CAR form RAF-11) _____

Referring Company _____

Referring Agent _____

BAR Fund Donation _____ \$10 [OR \$ _____]

HOA _____ Contact/Mgmt _____

Email _____ Phone # _____

Misc. Charges (fax or email all invoices to your escrow officer):

	City/Company Name	\$ Amount	Charge	Credit/Pay
County Transfer Tax:				
City Transfer Tax:				
HOA Transfer Fee:				
HOA Doc Fee:				
Home Warranty				
Hazard Disclosure				
NRCC	(Approved by lender?)			

Sewer Lateral for City of Berkeley, Oakland, Piedmont, Albany, El Cerrito, Richmond, Kensington, Alameda

In compliance before COE? [YES] [NO]

If not, collect \$ _____ from Buyer ☐ Seller ☐

California Withholding Required? [YES] [NO]

➔ **Seller is to complete Form 590 in escrow**

Federal Withholding Tax Required? [YES] [NO]

➔ **Seller is to complete FIRPTA forms in escrow**

City of Berkeley ONLY:

Escrow to file RECO Form A ☐ , B ☐ , C ☐ , D ☐

Charge: [Buyer] [Seller] How many Structures? _____

Retrofitting allowance credit applies to Buyer ☐ Seller ☐

Title: ☐ Joint Tenancy ☐ Tenants-In-Common

☐ Community Property ☐ Community Property+ right of survivorship

☐ Other _____

Rentback: Charge _____ @ \$ _____/PITI per day From _____ To _____[HOLD] [CREDIT] (approved by lender?)

Rents and Deposits:

Unit	Rent (month) \$	Paid to	Security Deposit \$	Misc. Deposits \$

Interest on Deposits? _____ Prorate Rent Stabilization Fees? _____

Send client’s papers and check to _____

Berkeley Hills Agent _____ **Date** _____

✂ - - - - - BHR Internal Use - - - - - ✂

In-house referral fee to: _____ \$ or % _____ Client Source: _____

MLS# _____ As is? [Yes] [No] Credits: \$ _____ Number of offers received _____

Information for After Sale Follow-Up:

Salutation: Dear [Mr.] [Mrs.] [Ms.] _____ and [Mr.] [Mrs.] [Ms.] _____

New Address of Client: _____

Follow-Up Options (check):

[✓]Survey []Copy of Agent Provided Home Warranty []BAR Fund Acknowledgement []HUD in time for taxes