



PRELIMINARY TERMS OF SALE  
& FILE COVER SHEET

Property: \_\_\_\_\_

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

\_\_\_\_\_ ☐ Buyer(s)

\_\_\_\_\_ ☐ Seller(s)

\_\_\_\_\_

Phone 1: \_\_\_\_\_ Phone 2: \_\_\_\_\_

Phone 3: \_\_\_\_\_ Phone 4: \_\_\_\_\_

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: \_\_\_\_\_

Sale 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+  
☐ Other \_\_\_\_\_ right of survivorship

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