



PRELIMINARY TERMS OF SALE
& FILE COVER SHEET

Property: _____

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

_____ ☐ Buyer(s)
_____ ☐ Seller(s)

Phone 1: _____ Phone 2: _____

Email 1 : _____ Email 2 : _____

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:

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

BESO City of Berkeley ONLY Escrow to file:

High Performance Exemption Form A ☐

Time of Sale Defferal to Buyer Form C ☐

Defferal for New Construction Form D ☐

Title: ☐ Joint Tenancy ☐ Tenants-In-Common

☐ Community Property ☐ Community Property+

☐ Other _____ right of survivorship

Retrofitting allowance credit applies to: ☐ Buyer ☐ Seller

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

RESET