



Syndicate Subscription Legal Plans

REAL ESTATE DEEDS **CLIENT INTAKE QUESTIONNAIRE:**

CONFIDENTIAL. A deed transfers title to real property from one person (the grantor) to another (the grantee). To be valid, a deed must be in writing, properly identify the parties and the property, contain words of transfer, be signed by the grantor, and be delivered and accepted. Transfers can also affect property taxes, loans, taxes, and inheritance, so please answer carefully. If a question does not apply, write "N/A." If unknown, write "Unknown." Please attach a copy of the current deed.

NAME OF THE CLIENT(s):

☐ Primary Party: _____

☐ Additional Party (if applicable): _____

Mailing Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Your role:

☐ Current owner (grantor)

☐ New owner (grantee)

☐ Both

☐ Family member / agent helping an owner

PART 1 — WHAT DO YOU NEED?

1.1 Check all that apply:

☐ Prepare a new deed

☐ Review a deed before signing

☐ Record a signed deed

☐ Add someone to title

☐ Remove someone from title

☐ Gift property to a family member

☐ Spousal transfer (marriage / divorce)

☐ Transfer into or out of a living trust

☐ Transfer on death deed

☐ Correct an error in a recorded deed

☐ Reconveyance after loan payoff

☐ Clear a title "cloud" / quiet title

☐ Suspected forged or fraudulent deed

☐ Sheriff's / foreclosure deed questions

☐ Not sure — need advice

1.2 Deadline (closing, refinance, divorce judgment, etc.): _____

1.3 In your own words, what do you want to accomplish? _____



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PART 2 — THE PROPERTY

2.1 Property address: _____

City: _____ County: _____ State: _____ Zip: _____

Assessor's Parcel Number (APN): _____

2.2 Property type:

☐ Single-family home ☐ Condominium ☐ Multi-unit residential

☐ Vacant land ☐ Commercial ☐ Other

2.3 Current owner(s) EXACTLY as shown on the current deed (vesting): _____

2.4 Recording date and document number of current deed: _____

2.5 Is there a mortgage or deed of trust on the property? ☐ Yes ☐ No

Lender(s) and approx. balance(s): \$ _____

2.6 Is the property in an HOA? ☐ Yes ☐ No

2.7 Is the property anyone's primary residence? Whose? ☐ Yes ☐ No

If yes, explain: _____

PART 3 — CURRENT OWNERS (GRANTORS)

Full Legal Name	Marital Status	Living?	Able & Willing to Sign?	Phone

3.1 Is any owner deceased? ☐ Yes ☐ No

If yes — name and date of death: _____

If an owner has died, a deed may not be the right tool; the property may need to pass through a trust, affidavit, or probate.

3.2 Will anyone sign for an owner as agent, trustee, or executor? ☐ Yes ☐ No

If yes, explain: _____

3.3 Is any owner married to someone not on title? ☐ Yes ☐ No



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PART 4 — NEW OWNERS (GRANTEES)

Full Legal Name	Relationship to Grantor	Marital Status	Age	Mailing Address

4.1 Is any grantee under 18? ☐ Yes ☐ No

Minors generally cannot manage real property directly; a custodian, trust, or guardian arrangement may be needed.

4.2 Is the grantee a trust, LLC, or other entity? ☐ Yes ☐ No

If trust — name and date of trust / trustees: _____

PART 5 — THE TRANSFER

5.1 Reason for the transfer:

- | | |
|---|---|
| ☐ Sale | ☐ Gift |
| ☐ Divorce / separation | ☐ Marriage / adding spouse |
| ☐ Estate planning | ☐ Transfer to / from trust |
| ☐ Transfer to / from business entity | ☐ Correction of prior deed |
| ☐ Required by lender | ☐ Other |

5.2 Price or other consideration (if any): \$ _____

5.3 Type of deed you believe is needed:

- | | |
|--|--|
| ☐ Grant deed | ☐ Quitclaim deed |
| ☐ Interspousal transfer deed | ☐ Trust transfer deed |
| ☐ Transfer on death deed | ☐ Gift deed |
| ☐ Warranty deed | ☐ Correction deed |
| ☐ Not sure — please recommend | |

A grant deed carries implied promises that the grantor has not already conveyed or encumbered the property. A quitclaim deed transfers only whatever interest the grantor has, with no warranties.

5.4 How should the new owner(s) hold title (vesting)?

- | | |
|---|--|
| ☐ Sole and separate property | ☐ Community property |
| ☐ Community property w/ survivorship | ☐ Joint tenancy |
| ☐ Tenants in common (list % below) | ☐ Trustee(s) of a trust |
| ☐ Not sure — please advise | |

Ownership percentages (if tenants in common): _____



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How title is held controls what happens when an owner dies and can affect taxes. Ask us before choosing.

PART 6 — IMPORTANT CONSIDERATIONS

Deed transfers can have consequences beyond ownership. Answer each question so we can flag issues before anything is signed or recorded.

6.1 If there is a loan, has the lender consented to the transfer? ☐ Yes ☐ No

Many loans allow the lender to demand full payment if title is transferred, although certain family and trust transfers are protected.

6.2 Is this a parent–child or grandparent–grandchild transfer? ☐ Yes ☐ No

Transfers can trigger a property tax reassessment. Some family transfers may qualify for an exclusion if claimed on time.

6.3 Will the property be the grantee’s primary residence? ☐ Yes ☐ No

6.4 Is the property value above the annual gift tax exclusion (for gifts)? ☐ Yes ☐ No

6.5 Have you discussed income tax and capital gains effects with a CPA? ☐ Yes ☐ No

6.6 Does any grantor receive or plan to apply for Medi-Cal? ☐ Yes ☐ No

6.7 Liens, judgments, tax debts, or bankruptcy involving any party? ☐ Yes ☐ No

If yes, explain: _____

6.8 Is a divorce or legal separation pending for any owner? ☐ Yes ☐ No

Transfers made to avoid creditors may be set aside, and transfers during a pending divorce may be restricted by court order.

6.9 Will homeowner’s insurance and title insurance be updated? ☐ Yes ☐ No

PART 7 — TRUST DEEDS & RECONVEYANCE

7.1 Have you paid off a loan secured by a deed of trust on this property? ☐ Yes ☐ No

Lender: _____ Payoff date: _____

7.2 Has a Full Reconveyance been recorded? ☐ Yes ☐ No

After a loan is paid off, the lender and trustee are required to have a reconveyance recorded within a set time. Penalties may apply if they fail to do so.

7.3 Are you a lender or seller who carried back a note secured by a deed of trust? ☐ Yes ☐ No

If yes, explain: _____

PART 8 — TITLE PROBLEMS

8.1 Problems (check all that apply):

- | | |
|--|--|
| ☐ Forged / unauthorized deed recorded | ☐ Name misspelled or wrong on deed |
| ☐ Wrong legal description / APN | ☐ Deceased owner still on title |
| ☐ Old lien or loan still showing | ☐ Dispute with a co-owner |
| ☐ Boundary / easement dispute | ☐ Someone claims rights to the property |
| ☐ Other | |



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8.2 Describe the problem and when you discovered it: _____

8.3 Have you contacted the county recorder, title company, or police? ☐ Yes ☐ No

If yes, explain: _____

PART 9 — SIGNING & RECORDING

9.1 Can all grantors sign in person before a notary? ☐ Yes ☐ No

9.2 Is any grantor out of the area, hospitalized, or homebound? ☐ Yes ☐ No

If yes, explain: _____

9.3 Any concern about a grantor's ability to understand the deed? ☐ Yes ☐ No

9.4 Is anyone pressuring a grantor to sign? ☐ Yes ☐ No

A deed signed without the capacity to understand it, or under pressure, can be challenged. Suspected elder financial abuse can be reported to Adult Protective Services.

9.5 Would you like us to record the deed with the county recorder? ☐ Yes ☐ No

PART 10 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

- | | |
|---|--|
| ☐ Current vesting deed | ☐ Preliminary title report / title policy |
| ☐ Property tax bill | ☐ Mortgage statement / payoff letter |
| ☐ Trust certificate or trust document | ☐ Divorce judgment / settlement |
| ☐ Death certificate (if an owner died) | ☐ Power of attorney |
| ☐ Prior deeds / chain of title | ☐ Wrong or fraudulent recorded document |
| ☐ Purchase agreement (if a sale) | ☐ Photo IDs of signers |



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Certification:

I/We declare that the information provided in this questionnaire is true, correct, and complete to the best of my/our knowledge. I/We understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my/our deed matter.

Signed and dated this ____ day of _____, 20__

Signature (Primary Party): _____

Print Name: _____

Signature (Additional Party): _____

Print Name: _____

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save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.