



Syndicate Subscription Legal Plans

REAL ESTATE CLIENT INTAKE QUESTIONNAIRE:

Send us contracts, notices, and demand letters **BEFORE** you sign or respond. Real estate deadlines are short: contract contingencies run in days, notices in days or weeks, and a lawsuit must be answered within weeks of service.

CONFIDENTIAL. This questionnaire covers residential and general real estate matters — deeds, purchase and sale agreements, leases, title and boundary problems, neighbor and HOA disputes, non-disclosure of defects, zoning, condemnation, property damage, and related disputes. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

Client type:

☐ Individual

☐ Married couple / co-owners

☐ Business / entity

☐ Trust

☐ Full Legal Name / Entity Name: _____

Contact person & title (if entity): _____ **Syndicate Plan Member ID:** _____

Address: _____

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

Phone: _____ Email: _____

Your role in this matter:

☐ Owner

☐ Buyer

☐ Seller

☐ Landlord

☐ Tenant

☐ Neighbor

☐ Co-owner

☐ HOA member

☐ Lender / lienholder

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — HOW CAN WE HELP?

Documents & Transactions:

☐ Deed preparation or recording *

☐ Purchase & sale agreement

☐ Lease preparation or review

☐ Enforce or cancel an agreement

☐ Escrow / deposit dispute

☐ Option, land contract, or seller financing

Title & Ownership:

☐ Title fraud / clouded title

☐ Set aside a fraudulent transfer

☐ Partition (force sale / division)

☐ Lien priority dispute

☐ Lis pendens (recorded or to record) *

☐ Quiet title



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Boundaries & Neighbors:

- | | |
|---|--|
| ☐ Boundary line dispute | ☐ Easement / access dispute |
| ☐ Trespass or encroachment | ☐ Nuisance (noise, odors, water, trees) |
| ☐ Fence or shared wall | ☐ View or light obstruction |

Buying & Selling Problems:

- | | |
|--|---|
| ☐ Seller failed to disclose defects | ☐ Misrepresentation by agent or seller |
| ☐ Inspection / repair disputes | ☐ Failure to close escrow |
| ☐ Property damage claim | ☐ Insurance dispute * |

Landlord–Tenant, HOA & Government:

- | | |
|---|--|
| ☐ Eviction — landlord * | ☐ Eviction defense — tenant * |
| ☐ Constructive eviction / habitability | ☐ Security deposit dispute |
| ☐ HOA assessments / fines / CC&Rs | ☐ Zoning / land use / permits |
| ☐ Condemnation or inverse condemnation | ☐ Construction defects * |

** Separate detailed intake forms exist for deeds, lis pendens, insurance, evictions (landlord and tenant), foreclosure, mechanics liens, and homeowner construction matters. We will let you know which ones to complete.*

1.1 In your own words, what is happening and what outcome do you want? _____

1.2 Any deadline (contract date, notice, hearing, response due): _____

PART 2 — THE PROPERTY

2.1 Property address: _____

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

Assessor's Parcel Number (APN): _____

2.2 Property type:

- | | | |
|---|--|---|
| ☐ Single-family home | ☐ Condo / townhouse | ☐ Multi-unit residential |
| ☐ Vacant land | ☐ Commercial / industrial | ☐ Mobile home |

2.3 Owner(s) of record (as shown on the deed): _____

2.4 Purchase date: _____ Purchase price: \$ _____ Current value: \$ _____

2.5 Loans / liens: \$ _____ Lender: _____

2.6 Occupancy:

- | | |
|--|---|
| ☐ Owner lives there | ☐ Tenant occupied |
| ☐ Vacant | ☐ Under construction |



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2.7 Is the property in an HOA or subject to CC&Rs? ☐ Yes ☐ No

2.8 Do you have title insurance? ☐ Yes ☐ No

PART 3 — OTHER PARTIES

Name	Role (buyer, seller, neighbor, HOA, agent, contractor)	Contact	Has a Lawyer?

PART 4 — TRANSACTIONS (PURCHASE, SALE OR LEASE)

4.1 Status:

☐ Considering / negotiating

☐ Offer accepted / in escrow

☐ Closed

☐ Cancelled / dispute

4.2 Price or rent: \$ _____ Deposit / security: \$ _____ Closing / start date: _____

4.3 Escrow / title company: _____ Escrow No.: _____

4.4 Real estate agents / brokers: _____

4.5 Contingencies:

☐ Inspection

☐ Appraisal

☐ Loan approval

☐ Sale of another property

☐ HOA document review

☐ None

4.6 Have any notices (to perform, cancel, or cure) been sent or received? ☐ Yes ☐ No

If yes, explain: _____

PART 5 — THE DISPUTE

5.1 When did the problem begin? _____ When did you discover it? _____

5.2 Describe the problem, including what each side says: _____

5.3 Amount in dispute or estimated loss: \$ _____

5.4 Have you sent or received a demand letter or notice? ☐ Yes ☐ No

If yes, explain: _____



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5.5 Is there a lawsuit, arbitration, or code enforcement case? ☐ Yes ☐ No

Court / agency / case no.: _____

5.6 Does your contract require mediation or arbitration? ☐ Yes ☐ No

PART 6 — ISSUE-SPECIFIC QUESTIONS

6.1 Boundary, Easement & Encroachment:

Is there a survey, recorded easement, or plat map? ☐ Yes ☐ No

What is encroaching or being blocked, and for how long? _____

6.2 Non-Disclosure of Defects:

What defects were discovered, and when? _____

Did you receive written disclosures and inspection reports? ☐ Yes ☐ No

Estimated repair cost: \$ _____

6.3 Co-Ownership & Partition:

Co-owners and ownership shares: _____

Who occupies the property? Who pays the mortgage, taxes, and repairs? _____

6.4 HOA:

Amount claimed by the HOA: \$ _____ Notices / fines received: _____

6.5 Zoning, Permits & Condemnation:

Agency involved: _____ Application / hearing date: _____

Agency offer amount (condemnation): \$ _____

PART 7 — GOALS & DOCUMENTS

7.1 What outcome do you want?

- | | |
|---|--|
| ☐ Prepare or review documents | ☐ Complete the transaction |
| ☐ Cancel the transaction & recover deposit | ☐ Money damages |
| ☐ Repairs made or paid for | ☐ Clear title |
| ☐ Force a sale or division | ☐ Stop the other party (injunction) |
| ☐ Negotiated settlement / mediation | |

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

- | | |
|--|--|
| ☐ Deed / preliminary title report | ☐ Purchase or lease agreement |
| ☐ Escrow instructions | ☐ Disclosure & inspection reports |
| ☐ Survey / plat map / photos | ☐ HOA CC&Rs & notices |



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☐ Notices, letters & emails

☐ Repair estimates & invoices

☐ Insurance policy & claim letters

☐ Court or agency papers

Certification:

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

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if entity): _____

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