

# Fact Sheet: Gift and Transfer Agreements

<b>Transferor / Donor</b>	<b>First Person</b>	<b>Second Person (if appl.)</b>
Last Name, First Name		
Maiden Name		
Date of Birth		
Address		
Telephone Number Fax E-mail		
Status/Property Regimen	<input type="radio"/> Single <input type="radio"/> Married / No Marital Agreement <input type="radio"/> Married with Prior Marital Agreement <input type="radio"/> Divorced <input type="radio"/> Widowed	<input type="radio"/> Single <input type="radio"/> Married / No Marital Agreement <input type="radio"/> Married with Prior Marital Agreement <input type="radio"/> Divorced <input type="radio"/> Widowed
Citizenship		
Tax Identification Number		

<b>Transferee / Donee</b>	<b>First Person</b>	<b>Second Person (if appl.)</b>
Last Name, First Name		
Maiden Name		
Date of Birth		
Address		
Telephone Number Fax E-mail		
Status/Property Regimen	<input type="radio"/> Single <input type="radio"/> Married / No Marital Agreement <input type="radio"/> Married with Prior Marital Agreement <input type="radio"/> Divorced <input type="radio"/> Widowed	<input type="radio"/> Single <input type="radio"/> Married / No Marital Agreement <input type="radio"/> Married with Prior Marital Agreement <input type="radio"/> Divorced <input type="radio"/> Widowed
Citizenship		
Tax Identification Number		
Will a land charge (mortgage) be required for purposes of financing?	<input type="radio"/> Yes <input type="radio"/> No	

<b>Property</b>		
District Folio Nr. Land Register Sheet Address		
Type of Buildings/Structures	<input type="radio"/> Entire Property <input type="radio"/> Portion of Entire Property <input type="radio"/> Single/Multi-Family Dwelling <input type="radio"/> Freehold Condominium/Apartments Nr. _____ <input type="radio"/> Other: _____  Year of Construction: _____	
Will moveable items (inventory) be transferred alongside the property?	<input type="radio"/> No <input type="radio"/> Yes, the following items (see attached list if necessary): <input type="radio"/> <input type="radio"/> <input type="radio"/>	
Market Value		
Only in the case of Freehold Condominiums/Apartments:	<ul style="list-style-type: none"> <li>• Parking Space Nr.</li> <li>• Property Manager</li> </ul>	

<b>Consideration</b>	
	<input type="radio"/> Right of Abode (Life Estate, etc.) <input type="radio"/> Care Services <input type="radio"/> Cash Annuity / Disbursement <input type="radio"/> Easement / Usage Rights <input type="radio"/> Assumption of Debts, Liabilities or Land Charge (Mortgage) <input type="radio"/> Negative Pledge / Cease-and-Desist Obligations <input type="radio"/> Reassignment Obligations: <ul style="list-style-type: none"> <li><input type="radio"/> Divorce</li> <li><input type="radio"/> Sale</li> <li><input type="radio"/> Encumbrance</li> <li><input type="radio"/> Predeceased</li> </ul> <input type="radio"/> Set-off vs. Compulsory Portion / Compensation Duty <input type="radio"/> Waiver of Compulsory Testamentary Portion

<b>Usage</b>	
Type of Usage	<input type="radio"/> Self-usage by Seller <input type="radio"/> Empty <input type="radio"/> Rented / Leased
In the case of rented or leased properties: Will the Transferee assume the agreement?	<input type="radio"/> Yes <input type="radio"/> No, agreement ends on _____ (Date)
Date of Transfer of Title: Possession, Benefits, Risks/Burdens	<input type="radio"/> Upon notary certification <input type="radio"/> On _____ (date)
Vacation Date	<input type="radio"/> Not vacated <input type="radio"/> Date of transfer of title <input type="radio"/> no later than _____ (date)

<b>Draft Deed</b>	<input type="radio"/> Please complete the draft agreement and send via post. <input type="radio"/> Please complete the draft agreement and send via e-mail. <input type="radio"/> Please also send the draft agreement to: _____ (e.g., Tax Advisor)
_____	_____
Place / Date	Signature