

# **THE POCKET LAWYER<sup>®</sup>**

## **Document Preparation Service**

### **/// Workbook ///**

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✍️ “We Help You Help Yourself” ✍️

**QUIT CLAIM, WARRANTY and GRANT DEEDS**



**PART “A”**

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# **THE POCKET LAWYER®**

## *Document Preparation Service Workbook*

**“Self-Help” Series**

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# The **POCKET LAWYER**<sup>®</sup> Document Preparation Service

## Deed Client Questionnaire

INSTRUCTIONS: Answer All questions with an answer or a N/A. Today's date \_\_\_\_\_  
 If more space is needed, use the space below or attach blank pages.

**INFORMATION ABOUT THE OWNER(S) (Known as Grantors)**

*Provide the name of the current owner(s) of the property exactly as shown on the deed where the current owners acquired the property.)*

1	First Name (Owner)			
2	Middle Name (Owner)			
3	Last Name (Owner)			
4	Street address			
5	City	County	State	Zip
6	Mailing address (if different) Street/ PO			
7	City	County	State	Zip
8	Home phone		Business phone	
9	First Name (Second Owner)			
10	Middle Name (Second Owner)			
11	Last Name (Second Owner)			
12	Street address			
13	City	County	State	Zip
14	Mailing address (if different) Street/ PO			
15	City	County	State	Zip
16	First Name (Grantee)			
17	Middle Name (Grantee)			
18	Last Name (Grantee)			
19	Street address			
20	City	County	State	Zip
21	Mailing address (if different) Street/ PO			
22	City	County	State	Zip
23	First Name (Second Grantee)			
24	Middle Name (Second Grantee)			
25	Last Name (Second Grantee)			
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Deed Client Questionnaire (continued)				
26	City	County	State	Zip
27	Mailing address (if different) Street/ PO			
28	City	County	State	Zip
<b>If additional space is needed, number and insert below.</b>				
	<b>PROPERTY INFORMATION</b>			
	<i>(Information about the Property that is being transferred or conveyed)</i>			
29	Street Address			
30	City	County	State	Zip
31	County Tax Parcel # <i>(include copy of current tax bill, if available):</i>			
32	Recorder lot and block number <i>(if known):</i>			
33	Description of property as stated on previous deed <i>(if known) (attach copy of deed, if available):</i>			
34	Type of property: <input type="checkbox"/> Vacant land <input type="checkbox"/> Land and house <input type="checkbox"/> Land and commercial building			
35	Date deed is to be effective:			
36	Select the type of deed you want to use: <input type="checkbox"/> Quitclaim Deed <input type="checkbox"/> Grant Deed <input type="checkbox"/> General Warranty Deed <input type="checkbox"/> Special Warranty Deed <input type="checkbox"/> Trust Deed <input type="checkbox"/> Reconveyance Deed <input type="checkbox"/> Gift Deed			
37	If there are two Owners, are they husband and wife? <input type="checkbox"/> Yes <input type="checkbox"/> No			
38	Are any of the Owner(s)' name(s) different know then on the original deed? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain:			
39	Is the property in a 'community property' state? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, which state? <input type="checkbox"/> Arizona <input type="checkbox"/> California <input type="checkbox"/> Idaho <input type="checkbox"/> Louisiana <input type="checkbox"/> Nevada <input type="checkbox"/> New Mexico <input type="checkbox"/> Texas <input type="checkbox"/> Washington <input type="checkbox"/> Wisconsin			
40	Select ONE of the following if there are more than <u>one</u> Grantee: <input type="checkbox"/> Tenancy by the Entirety (only for married Grantees) <input type="checkbox"/> Joint Tenancy <input type="checkbox"/> Tenancy in Common. If the Grantee chooses a Life Estate, you must indicate who the remainderman is: <i>(specify)</i>			
	<b>TRANSFER INFORMATION (For calculating County and State Documentary Transfer Tax)</b>			
41	The following is a list of real estate transactions that are exempt from the Documentary Transfer Tax. Check any box that applies:			
42	<input type="checkbox"/> Conveyances Confirming Title in Grantee			

Deed Client Questionnaire (continued)	
If additional space is needed, number and insert below.	
43	<input type="checkbox"/> Conveyances in Dissolution of Marriage
44	<input type="checkbox"/> Conveyances to Secure a Debt
45	<input type="checkbox"/> Reconveyances Upon Satisfaction of a Debt
46	<input type="checkbox"/> Conveyances Transferring Interests into or out of a Living Trust
47	<input type="checkbox"/> Conveyances Changing Manner in Which Title is Held
48	<input type="checkbox"/> Court Ordered Conveyances Not Pursuant to Sale
49	<input type="checkbox"/> Conveyances Given For No Value
50	<input type="checkbox"/> Conveyances to Establish Sole and Separate Property of a Spouse
51	<input type="checkbox"/> Conveyances to Confirm a Community Property Interest when property was purchased with Community Property Funds
52	<input type="checkbox"/> Conveyances to Confirm a Change of Name
53	<input type="checkbox"/> Conveyance of An Easement or Oil and Gas Lease Where the Consideration and Value is Less Than \$100
54	<input type="checkbox"/> Conveyances Where the Liens and Encumbrances Are Equal or More Than the Value of Property, and No Further Consideration is Given
55	<input type="checkbox"/> Conveyances From a Trustee Under a Land Contract at the Consummation of the Contract
56	<input type="checkbox"/> Conveyances From Individual(s)/ Legal Entity(ies) to Individual(s)/ Legal Entity(ies) Where the Grantors and Grantees Are Comprised of the Same Parties, and Parties Continue to Hold the Same Proportionate Interest
57	<i>The County assesses a Documentary Transfer Tax on the consideration or value of the real property equity at the rate of 55 cents per \$500, rounding up to the highest \$500. Also some cities impose additional taxes. Specify the city where the real property is located:</i>
ACKNOWLEDGEMENT and SIGNATURE	
<p>I (We), acknowledge that the information provided by me in this Workbook is true and accurate to the best of my knowledge. I further acknowledge that I am going to do my own <b>Deed</b> and want the <b>POCKET LAWYER<sup>®</sup></b> Document Preparation Service to assist me by performing certain document preparation services, according to my instructions. I will be solely responsible for the information contained in these documents and will have the opportunity to review the completed documents before they are filed. I understand that the <b>POCKET LAWYER</b> Document Preparation Service does <u>not</u> render legal advice or legal services and is acting solely at my direction and pursuant to my decisions. I further understand that I have the right to handle my own legal matters and act as my own attorney, but that the advice of an attorney may be necessary. The <b>POCKET LAWYER</b> Document Preparation Service encourages attorney participation and will provide a list of attorney referrals, at my request.</p> <p>I hereby relieve the <b>POCKET LAWYER</b> Document Preparation Service from any liability whatsoever, regarding this deed preparation, and agree to hold them harmless from any damages I may suffer and understand that my sole relief is limited to the return of any fee paid for the preparation of these documents.</p>	
Signature	Date
Print name	
Signature	Date
Print name	
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