

Law Offices of

# SYLVIA E. HELDRETH, P.A.

Certified Specialist – Real Estate Law  
The State Board of Florida  
Board of Legal Specialization

Wills • Trusts • Estate Planning  
Probate Administration  
Incorporations • LLC Formations  
Condominium Law  
Mortgages • Refinances  
Title Insurance Closings

## WORKSHEET CONTRACT FOR SALE AND PURCHASE

**Please deliver this completed worksheet PLUS a copy of the deed or tax bill or prior title policy (for possible reissue rate) PLUS \$500.00 non-refundable. Fee check payable to Law Offices of Sylvia E. Heldreth, P.A. We will call you when the contract is ready to review.**

**Property Type:**            residential            commercial            multi-family            vacant land  
(Circle all that apply)

**Please tell us who you were referred by:** \_\_\_\_\_

**Seller(s) Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone No.:** (H) \_\_\_\_\_ Fax No. \_\_\_\_\_

(W) \_\_\_\_\_ Cell \_\_\_\_\_

**Email:** \_\_\_\_\_

**Buyer(s) Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone No.:** (H) \_\_\_\_\_ Fax No. \_\_\_\_\_

(W) \_\_\_\_\_ Cell \_\_\_\_\_

**Email:** \_\_\_\_\_

**Property Address:** \_\_\_\_\_

**Circle All Items Included:** range, dishwasher, disposal, ceiling fans, intercom, light fixtures, rods, draperies and other window treatments, garage door openers, security gate, and other access devices

**Circle Additional Items:** refrigerator, microwave oven, washer, dryer, stand-alone ice maker, smoke detector(s), security system, window/wall a/c, generator, pool barrier/fence, pool equipment, pool heater, spa or hot tub with heater, above ground pool, storage shed, TV antenna/satellite dish, water softener/purifier, and storm shutters and panels

List Additional Items Not stated above: \_\_\_\_\_

List Excluded Items: \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_ Escrow Initial Deposit: \$ \_\_\_\_\_

Additional Deposit w/in \_\_\_\_\_ days \$ \_\_\_\_\_

To be held by: \_\_\_\_\_

Will Buyer be paying all cash or obtaining loan or seller financing? (Circle one)

If to be financed: Loan Amount \$ \_\_\_\_\_

Fixed or Adjustable \_\_\_\_\_

Balloon Payment Date: \_\_\_\_\_

Amortize 15 or 30 yrs? (Circle one) \_\_\_\_\_

Interest Rate \_\_\_\_\_

Loan approval required within \_\_\_\_\_ days

FHA or VA (Circle if applies) \_\_\_\_\_

Closing Date: \_\_\_\_\_

Is this the Seller's homestead property? Yes or No

If yes, and the seller is married, the spouse must also sign the contract. Please give spouse's name (if not on title): \_\_\_\_\_

If property is improved, was it built before 1978? Yes or No

Is this property being sold AS-IS? Yes or No

If no, how much is Seller willing to pay towards repairs? \$ \_\_\_\_\_

Is Seller a U.S. Citizen? Yes or No

If No: Do you have permanent resident status or file yearly IRS 1040? Yes or No

If yes, attach copy of card or 1040

Is property a Condo or Homeowner Association: Yes or No

If yes, is approval of buyer required? Yes or No

Does Association have right of first refusal? Yes or No

Dues are \$ \_\_\_\_\_ Monthly, Quarterly or Annually (Circle one)

Recreation fees? Yes or No

Special Assessments now or in future: Yes or No

Parking Space # \_\_\_\_\_, Garage # \_\_\_\_\_ or Other: \_\_\_\_\_

**Are there any sewer, water, irrigation or other special assessments pending?** Yes or No

If yes, describe:

Will Seller be paying off? or bringing current? or will Buyer assume? (Circle one)

**Are there existing tenants?** Yes or No

If yes, provide copy(ies) of lease(s).

**Is this a short sale?** Yes or No

If yes, are back up offers allowed? Yes or No

**Are any real estate agents helping on this sale/purchase?** Yes or No

If yes, name and phone number: \_\_\_\_\_

**Are there any other special considerations or terms which Buyer and Seller have discussed?**  
**Please use additional sheet if needed:**

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