

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

### DEED TRANSFER WITHOUT TITLE EXAMINATION

**Please deliver to Law Offices of Sylvia E. Heldreth, P.A., this completed worksheet PLUS:**

- (1) A copy of the deed or tax bill showing how title presently is held and the legal description.
- (2) \$300 check payable to Law Offices of Sylvia E. Heldreth, P.A. This covers the attorney fees only. Costs will be billed separately, e.g., recording fees, documentary stamps, charges for overnight, etc.
- (3) It takes three to five business days after we receive the above to send out the deed for execution.

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

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

**Present Owners' Names :** \_\_\_\_\_

**Marital Status of Owners:** husband and wife single married (Circle one)

**Social Security numbers for all owners:** \_\_\_\_\_

**Addresses for current owners:** \_\_\_\_\_

**Phone Number:** (H) \_\_\_\_\_ Fax No. \_\_\_\_\_  
(W) \_\_\_\_\_ Cell: \_\_\_\_\_

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

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

**How Do You Want Title to Read After Deed Transfer:** \_\_\_\_\_

**To What Address Do You Want Future Tax Bills Sent:** \_\_\_\_\_

**Are there any mortgages on this property? Yes or No. If yes, see paragraph 2 on the next page for additional requirements.**

DOCUMENTARY STAMPS MUST BE PAID BASED ON THE VALUE OF THE PROPERTY BEING TRANSFERRED UNLESS THE TRANSACTION IS EXEMPT. IF YOU HAVE ANY QUESTIONS CONCERNING WHAT VALUE MUST BE REPORTED, CONTACT THE COUNTY PROPERTY RECORDER'S OFFICE FOR ASSISTANCE. THIS OFFICE ASSUMES NO RESPONSIBILITY FOR DETERMINING WHETHER OR NOT THIS TRANSFER IS EXEMPT. YOU MUST MAKE THIS DETERMINATION. WHAT IS THE AMOUNT YOU WANT REPORTED TO THE DEPT. OF REVENUE FOR THIS TRANSFER? \$ \_\_\_\_\_

(You must fill in an amount or write zero if this is your determination.)

**BEFORE YOU DECIDE TO HAVE THIS OFFICE ASSIST YOU WITH THIS DEED TRANSFER, PLEASE CAREFULLY READ THE FOLLOWING:**

- 1. THIS OFFICE DOES NOT GIVE ANY TAX ADVICE. THIS TRANSFER MAY BE TAXABLE (E.G. GIFT TAX, CAPITAL GAINS TAX, INCOME TAX, OR OTHER TAXES). IT IS VERY IMPORTANT THAT YOU OBTAIN TAX ADVICE FROM YOUR CERTIFIED PUBLIC ACCOUNTANT BEFORE PROCEEDING WITH THIS TRANSFER.**
- 2. IF THERE ARE ANY MORTGAGES ON THIS PROPERTY, YOU MUST OBTAIN YOUR LENDER'S WRITTEN CONSENT TO THIS TRANSFER BEFORE PROCEEDING. ALSO, PROVIDE THIS OFFICE WITH A COPY OF THE CONSENT AND A COPY OF YOUR MOST RECENT BANK STATEMENTS.**
- 3. THIS DEED TRANSFER WILL BE WITHOUT ANY TITLE SEARCH OR EXAMINATION AND NO TITLE INSURANCE POLICY WILL BE ISSUED. COVERAGE UNDER ANY EXISTING TITLE INSURANCE POLICY MAY BE TERMINATED BY THIS TRANSFER.**
- 4. THE TRANSFEREE SHOULD NOT RELY ON THE CURRENT PROPERTY TAXES AS THE AMOUNT OF PROPERTY TAXES THAT THE TRANSFEREE MAY BE OBLIGATED TO PAY IN THE FUTURE. A CHANGE IN OWNERSHIP TRIGGERS REASSESSMENT OF THE PROPERTY THAT COULD RESULT IN HIGHER PROPERTY TAXES. IF YOU HAVE ANY QUESTIONS CONCERNING VALUATION, CONTACT THE COUNTY PROPERTY APPRAISER'S OFFICE FOR INFORMATION**
- 5. IF THIS IS HOMESTEAD PROPERTY, THIS CHANGE OF OWNERSHIP CAN TRIGGER REASSESSMENT AND A LOSS OF THE CURRENT SOH (SAVE OUR HOMES) CAP. IF YOU HAVE ANY QUESTIONS CONCERNING VALUATION OR THE SOH CAP, CONTACT THE COUNTY PROPERTY APPRAISER'S OFFICE FOR INFORMATION.**
- 6. THIS DEED TRANSFER WORKSHEET SHOULD NOT BE USED IF ANY CURRENT OWNER IS DECEASED OR IF THIS IS A SALE OF THE PROPERTY FOR ANY SUM OF MONEY. IF EITHER IS APPLICABLE, YOU MUST SPEAK WITH THE ATTORNEY BEFORE PROCEEDING.**

I have read the above on this \_\_\_ day of \_\_\_\_\_.

**Note:** In order to show everyone's consent, this form must be signed by all present owners and any owners to be added.