

**PEPPERDINE UNIVERSITY REAL ESTATE OPERATIONS OFFICE**  
**Pepperdine Charitable Remainder Trust Worksheet**

Please complete the following:

1. Name(s) and date(s) of birth of owners(s):

A. \_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_  
Name Birth Date

B. \_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_  
Name Birth Date

2. Address of Owner(s): \_\_\_\_\_  
\_\_\_\_\_

Home Phone: (\_\_\_\_)\_\_\_\_\_ Business Phone: (\_\_\_\_)\_\_\_\_\_ FAX: (\_\_\_\_)\_\_\_\_\_

3. Address of Property: \_\_\_\_\_  
\_\_\_\_\_

4. Description of Property: \_\_\_\_\_  
\_\_\_\_\_

5. Fair Market Value: \_\_\_\_\_  
\_\_\_\_\_

6. Encumbrances, if any: \_\_\_\_\_  
\_\_\_\_\_

7. Are any of the encumbrances less than 5 years old? (if yes provide amounts and dates):  
\_\_\_\_\_

8. Basis (Original costs plus capital improvements less depreciation):  
\_\_\_\_\_

9. Vesting (Name(s)) in Which Title is Held:  
\_\_\_\_\_