

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:
