



NISS Foundation, Inc. (501c3, IRS filed national public charity/foundation)
Confidential (RFP) Request For Proposal for a Charitable & Financial Programs & Solutions .

FAX TO 24 HR PRIVATE *digital* FAX: **703-832-8685** ***items that are required***

* If you are married, please indicate if you want a single calculation for you only, or one that is joint, last to die

_____ Single _____ Joint (Last to die) _____ Relatives _____ Business Partners _____ Other

SELLER/DONOR: *FULL NAME: _____

SOCIAL SECURITY NUMBER: _____ - _____ - _____ (confidential/to track clients)

*LEGAL RESIDENCE ADDRESS : _____

*CITY _____ STATE _____ ZIP _____

*BIRTH DATE (MM/DD/YYYY): _____ AGE: _____

*HOME PHONE: _____ WORK/CELL PHONE: _____

EMAIL ADDRESS: _____ @ _____ *Very helpful for communication*

SPOUSE (JOINT SELLER - IF APPLICABLE)

FULL NAME: _____

SOCIAL SECURITY NUMBER: _____ - _____ - _____ (confidential/to track clients)

LEGAL RESIDENCE ADDRESS : _____

CITY _____ STATE _____ ZIP _____

BIRTH DATE (MM/DD/YYYY): _____ AGE: _____

HOME PHONE: _____ WORK/CELL PHONE: _____



I would also like a review to compare various options such as **Charitable Gift Annuity & Charitable Remainder Annuity Trust & Charitable Bargain Installment Sale** Yes No

What type of asset(s) is being sold? (*CHECK ALL THAT APPLY*)

Real Estate Investment/Brokerage Account Business Holdings
 Life Insurance Collectables Other

How is the Legal Title/ Ownership to the property/asset held? (*CHECK ONE*)

Person(s) Named Herein Type of Entity (S, C, LLC, L.P.) Living Trust

If Company or Trust, Name and Type of Trust/Company: _____

NOTE: If the property being sold is/are shares or assets of a Corporation, indicate if you have a buy/sell agreement.

If Corporation, is there a **signed** buy-sell agreement or real estate contract in place? (*CIRCLE ONE*)

Yes No How many partners/shareholders/owners? _____

NOTE: It could be helpful for NISS to speak with your other team members. We will not contact them without your approval. Please enter their information below for us to refer to if needed during the planning process.

Realtor® Name: _____ Realty Co: _____ Telephone Number: _____

Settlement Date: _____ Settlement Co: _____ Telephone Number: _____

Settlement Officer/Attorney: _____ Telephone Number: _____

DEFERRAL INFORMATION:

If you plan to **DEFER** receipt of payments please indicate how long you want to defer payments to you? If no deferral desired, mark **IMMEDIATE**.

Years Months IMMEDIATE (Starts within 60 days/2 Months)

Indicate the term or period of time you wish NISS™ to **DISTRIBUTE** payments to you.

Years Months *Remember to take younger spouse into consideration

Goal as to the amount of money you want or need each month or payment period from the NISS Foundation, Inc.

\$ _____ Per Payment Period (i.e. per Month) Not Sure

At what frequency intervals you would want to receive installment payments from the NISS Foundation, Inc. as part of the Charitable Installment Bargain Sale® (NISS Asset Exchange™)? (*CHECK ONE. Typically MONTHLY*)

Monthly Quarterly Bi-Annually Annually

Would you like to have a trust established to receive the balance or remaining payments at your death (or the death of last spouse)? Yes No *If yes, we will contact you to determine type of trust desired.*

What is you current FEDERAL TAX Bracket _____% (*This helps us determine accurate tax deduction & forgiveness*)



IF REAL ESTATE - PROPERTY (Please fill in as much as possible).**

Real Estate Type (*CHECK ONE*): _____ Primary Residence _____ 2nd Home _____ Investment Property
 _____ Raw Land _____ Commercial Property

Street Address of Investment Property: _____

City: _____ State: _____ Zip: _____

In what name(s)/manner is the property deeded? _____

Percentage to NISS Asset Exchange™ _____ % Percentage to 1031 _____ % Percentage to Cash _____ %

Do you have a current contract or interested buyer to sell these assets to _____ Yes _____ No /Settlement date: _____

NOTE: *If you do have such an agreement it will be imperative that we review this agreement to determine eligibility.*

- How long have you owned this property? _____
- Gross Fair Market Value (Contract Sale Price): \$ _____
- Appraised Value of the property being sold: \$ _____
- Costs Basis (Original Cost + Improvements) \$ (_____)
- DEBT: Mortgages or Loans on the property \$ (_____)

NOTE: *If the mortgage exceeds the adjusted basis (purchase price, minus depreciation, plus improvements) you will have an immediate taxable gain on the difference between the mortgage amount and the adjusted basis. You may use the NISS™ issued tax deduction to offset.*

- EXACT amount of depreciation recapture \$ (_____)
 (If not known, consult your CPA for this amount)

NOTE: *Depreciation Recapture can not be deferred under IRC Section 453. However, use the NISS™ issued tax deduction will largely help offset this obligation and allow you to net more from your paid installment payments due to the recapture portion not due in the installment payments themselves.*

- Estimated settlement fees, real estate commissions, etc. \$ (_____)
 - Cash or Percentage you plan to keep out from the sale. \$ (_____)

If more than one property is being sold, please make a copy of this page and complete all the above information for EACH ADDITIONAL PROPERTY identified.

NOTES/DETAILS OF TRANSACTION:



IF AN INVESTMENT ACCOUNT (Include Brokerage Accounts and Stock Options & Self Directed IRAs)

* Only Non-Qualified (after tax) investments considered. *(If you wish to liquidate an IRA please discuss this with us)*

What name(s) is the investment account in? _____

Please attach the most recent value/account statement to this form if able.

How long have you owned asset/account? _____ Years _____ Months (Name of Brokerage: _____)

(ANSWER ALL)

- Gross Fair Market Value (Actual Account/Market Value): \$ _____
- Cost Basis (Original Investment Amount) \$ (_____)
- DEBT: amount of loans/liens against the asset \$ (_____)
- Estimated sales fees, commissions, charges, etc. \$ (_____)
- Cash you plan to keep out from transfer \$ _____

NOTE: Any cash held out up-front will be subject to its pro-rate share of gains or income tax as specifically classified, and therefore immediately taxable to that extent.

IF A BUSINESS (Business Interests/Holdings)

If the property being sold is a business, check here _____ if what you would actually transfer is stock or partnership shares (including stock options) to be received by the Assignment Company, NISS™.

_____ Shares \$ _____ Assets _____ % Percentage of ownership interest

* If the exchange property is Proprietorship business assets rather than shares of a partnership or corporation, break the fair market value into the components below. These can be estimated, but the total must equal the net cash received value above in question seven.

BUSINESS TYPE: _____ C Corp. _____ S Corp. _____ LLC _____ Limited Partnership _____ Sole Proprietor

Sales Price: \$ _____ Date of Proposed Sale/Settlement: _____ / _____ / _____

Cost Basis Amount: \$ _____ Owned since: _____ / _____ / _____

Worth of Company: \$ _____ Has company been valued/appraised? Y / N
(if Yes, attach valuation)

Capital Gains Amount: \$ _____ If No, who will value? _____

Any DEBT or Mortgages: \$ _____ Any pending legal action: *(explain of an attached sheet)*

Desired Cash Out if any from sale: \$ _____ Any Business Broker Fees: \$ _____

NOTE: Any cash held out up-front will be subject to its pro-rate share of gains or income tax as specifically classified, and therefore immediately taxable to that extent.



IF A COLLECTABLE (*Rare assets such as Jewelry, Antiques, Cars, Traded Collectables, and Art*):

What name(s) are these collectables held in? _____

Please attach the most recent value/account statement to this form if able.

How long have you owned these collectables? _____ Years _____ Months

Where are these collectables located (Auction House, etc.): _____

Do you have a current contract or interested buyer to sell these assets to _____ Yes _____ No

(ANSWER ALL)

- Gross Fair Market Value (Actual Account/Market Value): \$ _____
- Cost Basis (Original Investment Amount) \$ (_____)
- DEBT: amount of loans/liens against the asset \$ (_____)
- Estimated sales fees, commissions, charges, etc. \$ (_____)
 - Cash you plan to keep out from transfer \$ _____

NOTE: Any cash held out up-front will be subject to its pro-rate share of gains or income tax as specifically classified, and therefore immediately taxable to that extent.



***IMPORTANT: Fill out if submitting on behalf of a prospective client so that the agent/advisor can be notified if we have additional questions. Email address is desired to provide for efficient communication.**

FINANCIAL ADVISOR/AGENT (this can be you the NISS Pro™)

Individual Name of agent/advisor: _____

Company Name of agent/advisor: _____

Email Address of agent/advisor: _____

Phone Number of agent/advisor: _____

How long have you been dealing with this person/company?: _____ Months _____ Years

ACCOUNTANT/CPA

Individual Name of CPA: _____

Company Name of CPA: _____

Email Address of CPA: _____

Phone Number of CPA: _____

How long have you been dealing with this person/company?: _____ Months _____ Years

REAL ESTATE AGENT (or Business Broker if applicable)

Individual Name of Realtor®: _____

Company Name of Realtor®: _____

Email Address of Realtor®: _____

Phone Number of Realtor®: _____

How long have you been dealing with this person/company?: _____ Months _____ Years

ATTORNEY

Individual Name of Attorney: _____

Company Name/Law Firm: _____

Email Address of Attorney: _____

Phone Number of Attorney: _____

How long have you been dealing with this person/company?: _____ Months _____ Years

The information provided in this submitted proposal shall be kept confidential and not shared with any party outside The NISS Foundation, Inc. (NISS™) and our associated law firm and or the advisor(s) or counsel that have introduced NISS™ to you. This information is purely for the purposes of illustration, education and review. Always consult your tax advisor when considering plans that impact your taxable exposure. NISS™ does not provide tax advisement but does provide a legal solution.