

Juliette Yuan & Associates

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[CLIENT WORK FILE]

Date of Contact:

Name of Client:

Billing Address:

Telephone

Home:

Work:

Cell:

Email:

Fax:

Intended User(s):

A:

B:

C:

Referred by:

PURPOSE OF THE APPRAISAL

Insurance (Retail Replacement Value)

Replacement Value

Donation (Fair Market Value)

Charitable Donation

Donor:

Donee Institution:

Date of Gift Deed:

Estate (Fair Market Value)

Estate Filing (IRS)

Name of Descendent:

Date of Death:

Address:

Executor

Attorney

Estate Planning

Equitable Distribution

Date of Divorce Filing:

Damage/Loss - Date of Damage/Loss:

Gift Tax Donation

Donor:

Donee:

Date of Title Change:

Resale

Liquidation

Collateral

Power of Attorney

SCOPE OF THE PROJECT

Comments:

