# Juliette Yuan & Associates -

163, E 92nd Street, Unit 4, New York NY 10128 | +1 917 742 3988 | juliette.yuan@jyuanassociates.com

## [CLIENT WORK FILE]

Date of Contact:	
Name of Client:	Intended User(s):
Billing Address:	A:
Telephone	B:
Home:	C:
Work:	
Cell:	Referred by:
Email:	
Fax:	

#### PURPOSE OF THE APPRAISAL

<ul> <li>Insurance (Retail Replacement Value)</li> </ul>	
Replacement Value	Damage/Loss - Date of Damage/Loss:
<ul> <li>Donation (Fair Market Value)</li> </ul>	
<ul> <li>Charitable Donation</li> </ul>	<ul> <li>Gift Tax Donation</li> </ul>
Donor:	Donor:
Donee Institution:	Donee:
Date of Gift Deed:	Date of Title Change:
<ul> <li>Estate (Fair Market Value)</li> </ul>	□ Resale
<ul> <li>Estate Filing (IRS)</li> </ul>	
Name of Descendent:	
	<ul> <li>Liquidation</li> </ul>
Date of Death:	
Address:	<ul> <li>Collateral</li> </ul>
Executor O Attorney	<ul> <li>Power of Attorney</li> </ul>
Estate Planning	
<ul> <li>Equitable Distribution</li> </ul>	
Date of Divorce Filing:	

### SCOPE OF THE PROJECT

### Comments:



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### [CLIENT WORK FILE]

### LOCATION OF THE PROPERTY TO BE APPRAISED

□ Private Home □ Storage □ Other (with description)\*

Limiting Condition (Photos Only)

\*Others description:

### **ESTIMATED FEES**

Hourly
 Flat Fee
 Consultant's Fees

Comments:

### DOCUMENTATION

Letter of Agreement/Contract Sent Date:

• Deposit Received Date:

- Final Invoice Issued Date:
- Appraisal Report Delivered Date:

### COMMENTS