

**Wasker, Dorr, Wimmer & Marcouiller, P.C.**  
**ALTA Universal ID**  
**4201 Westown Parkway, Ste. 250**  
**West Des Moines, IA 50266**

**File No./Escrow No.:** REG127174-MDK  
**Print Date & Time:** June 14, 2022 at 02:14:PM  
**Officer/Escrow Officer:** Matthew D Kern

**Settlement Location:**

**Property Address:** 405 NW Morningside Drive  
Grimes, IA 50111

**Borrower:** Noah Sattler and Lindsay Sattler  
**Seller:** Lucas L. Allsup and Amanda L. Allsup  
**Lender:** Wings Financial Credit Union  
**Settlement Date:** June 15, 2022  
**Disbursement Date:** June 15, 2022

**What is an ALTA Statement?**

The ALTA settlement statement is an itemized list of all of the fees or charges that the buyer and seller will pay during the settlement portion of a real estate transaction. Everything from the sale price, loan amounts, school taxes and other pertinent information is contained in this document.

The statements are provided to brokers and agents on both the buying and selling ends of the transaction.

Seller		Description	Borrower/Buyer	
Debit	Credit		Debit	Credit
<b>Financial</b>				
	\$ 250,000.00	Sale Price of Property	\$ 250,000.00	
		Deposit		\$ 1,500.00
		Loan Amount		\$ 237,500.00
\$ 5,000.00		Seller Credit		\$ 5,000.00
<b>Prorations/Adjustments</b>				
\$ 3,913.58		County Taxes 07/01/21 to 06/15/22		\$ 3,913.58
<b>Loan Charges to Wings Financial Credit Union</b>				
		Origination Fee	\$ 950.00	
		Mortgage Insurance Premium	\$ 45.52	
		Prepaid Interest \$32.53 per day from 06/15/22 to 07/01/22	\$ 520.55	
<b>Other Loan Charges</b>				
		Appraisal Fee to Ascend Valuation Svcs	\$ 425.00	
		Credit Report Fee to Credit Plus	\$ 48.50	
		Flood Cert to Service Link	\$ 9.00	
		Tax Service to Lereta LLC	\$ 92.00	
<b>Impounds</b>				
		Homeowner's Insurance 3 mo @ \$ 78.17 /mo	\$ 234.51	

Seller		Borrower/Buyer	
Debit	Credit	Debit	Credit
		Property Taxes	\$ 1,924.98
		6 mo @ \$ 320.83 /mo	
		Aggregate Adjustment	\$ -234.49
<b>Title Charges &amp; Escrow / Settlement Charges</b>			
		Title- Lenders Policy to Title Guaranty	\$ 175.00
		Title- Settlement/Closing Fee to Wasker, Dorr, Wimmer & Marcouiller, P.C.	\$ 610.00
		Title- Title Examination to Wasker, Dorr, Wimmer & Marcouiller, P.C.	\$ 195.00
<b>Commission</b>			
\$ 6,500.00		Commission to RE/MAX Revolution	
\$ 7,500.00		Commission to Keller Williams	
<b>Government Recording and Transfer Charges</b>			
		Recording Fees to County Recorder	\$ 84.00
		Deed:\$17.00 Mortgage:\$67.00	
\$ 399.20		Revenue Stamps to County Recorder	
<b>Payoffs</b>			
\$ 164,961.99		Payoff of First Mortgage Loan to PennyMac Mortgage	\$ 164,891.54
		Loan Payoff	
		As of 06/20/22	
		Include additional interest for	
		-5 Days @ 14.090000 Per Diem/Day Plus 10 Extra Days	
<b>Miscellaneous</b>			
\$ 425.00		Abstract or Title Search Fee to Title Services	\$ 75.00
\$ 40.00		Courier Fee to Wasker, Dorr, Wimmer & Marcouiller, P.C.	
\$ 75.00		Document Preparation to Leanne K Krell	
\$ 525.00		Property Transaction Fee to Remax Revolution	
		Compliance Fee to Keller Williams	\$ 295.00
		Homeowner's Insurance Premium to Progressive Ins	\$ 938.00
		Paid by Borrower before closing	
\$ 189,339.77	\$ 250,000.00	<b>Subtotals</b>	\$ 255,449.57
\$ 60,660.23		<b>Balance Due FROM</b>	\$ 7,535.99
\$ 250,000.00	\$ 250,000.00	<b>Balance Due TO</b>	
		<b>TOTALS</b>	\$ 255,449.57

Seller		Borrower/Buyer	
Debit	Credit	Debit	Credit

**Acknowledgement**

We/I have carefully reviewed the ALTA Settlement Statement and find it to be a true and accurate statement of all receipts and disbursements made on my account or by me in this transaction and further certify that I have received a copy of the ALTA Settlement Statement. We/I authorize Wasker, Dorr, Wimmer & Marcouiller, P.C. to cause the funds to be disbursed in accordance with this statement.

\_\_\_\_\_  
Noah Sattler

\_\_\_\_\_  
Lindsay Sattler

\_\_\_\_\_  
Lucas L. Allsup

\_\_\_\_\_  
Amanda L. Allsup

\_\_\_\_\_  
Matthew D Kern, Escrow Officer



# Closing Disclosure

Closing Disclosure - The Closing Disclosure (CD - formerly the HUD-1 Uniform Settlement Statement) is a three-page, government-mandated form that details the costs associated with a real estate transaction. The borrower should receive a copy of the CD from the lender at least one day prior to the closing.

## Closing Information

**Date Issued**  
**Closing Date** 06/15/22  
**Disbursement Date** 06/15/22  
**Settlement Agent** Wasker, Dorr, Wimmer & Marcouiller, P.C.  
**File #** REG127174-MDK  
**Property** 405 NW Morningside Drive  
 Grimes, IA 50111  
**Sale Price** \$250,000

## Transaction Information

**Borrower** Noah Sattler and Lindsay Sattler  
 405 NW Morningside Drive  
 Grimes, IA 50111  
**Seller** Lucas L. Allsup and Amanda L. Allsup  
 77666 Lansing Rd  
 Anita, IA 50020

## Summaries of Transactions

### SELLER'S TRANSACTION

<b>M. Due to Seller at Closing</b>	<b>\$ 250,000.00</b>
01 Sale Price of Property	\$ 250,000.00
02 Sale Price of Any Personal Property Included in Sale	
03	
04	
05	
06	
07	
08	
<b>Adjustments for Items Paid by Seller in Advance</b>	
09 City/Town Taxes	
10 County Taxes	
11 Assessments	
12	
13	
14	
15	
16	
<b>N. Due from Seller at Closing</b>	<b>\$ 189,339.77</b>
01 Excess Deposit	
02 Closing Costs Paid at Closing (J)	\$ 15,464.20
03 Existing Loan(s) Assumed or Taken Subject to	
04 Payoff of First Mortgage Loan	\$ 164,961.99
05 Payoff of Second Mortgage Loan	
06	
07	
08 Seller Credit	\$ 5,000.00
09	
10	
11	
12	
13	
<b>Adjustments for Items Unpaid by Seller</b>	
14 City/Town Taxes	
15 County Taxes	07/01/21 to 06/15/22 \$ 3,913.58
16 Assessments	
17	
18	
19	

### CALCULATION

Total Due to Seller at Closing (M)	\$ 250,000.00
Total Due from Seller at Closing (N)	- \$ 189,339.77
<b>Cash <input type="checkbox"/> From <input checked="" type="checkbox"/> To Seller</b>	<b>\$ 60,660.23</b>

## Contact Information

### REAL ESTATE BROKER (B)

<b>Name</b>	Keller Williams
<b>Address</b>	4001 Westown Pkwy West Des Moines, IA 50266
<b>IA License ID</b>	F05542000
<b>Contact</b>	Macauley Stokesq
<b>Contact IA License ID</b>	S6916500
<b>Email</b>	m.stokes@KW.com
<b>Phone</b>	(515)371-6807

### REAL ESTATE BROKER (S)

<b>Name</b>	RE/MAX Revolution
<b>Address</b>	932 N Shadyview Blvd Pleasant Hill, IA 50327
<b>IA License ID</b>	F06080000
<b>Contact</b>	Brett Corrigan
<b>Contact IA License ID</b>	S69186000
<b>Email</b>	brett@soldbyrev.com
<b>Phone</b>	(515)554-7262

### SETTLEMENT AGENT

<b>Name</b>	Wasker, Dorr, Wimmer & Marcouiller, P.C.
<b>Address</b>	4201 Westown Parkway, Ste. 250 West Des Moines, IA 50266
<b>IA License ID</b>	
<b>Contact</b>	Matthew D Kern
<b>Contact IA License ID</b>	AT0004175
<b>Email</b>	closings@wdwm.net
<b>Phone</b>	(515)283-1801



**Questions?** If you have questions about the loan terms or costs on this form, use the contact information above. To get more information or make a complaint, contact the Consumer Financial Protection Bureau at [www.consumerfinance.gov/mortgage-closing](http://www.consumerfinance.gov/mortgage-closing)



# Closing Cost Details

Loan Costs	Seller-Paid	
	At Closing	Before Closing
<b>A. Origination Charges</b>		
01 % of Loan Amount (Points)		
02		
03		
04		
05		
06		
07		
08		
<b>B. Services Borrower Did Not Shop For</b>		
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
<b>C. Services Borrower Did Shop For</b>		
01		
02		
03		
04		
05		
06		
07		
08		

Other Costs		
<b>E. Taxes and Other Government Fees</b>		
01 Recording Fees	Deed: Mortgage:	
02 Revenue Stamps	to County Recorder	\$ 399.20
<b>F. Prepays</b>		
01 Homeowner's Insurance Premium ( mo.)		
02 Mortgage Insurance Premium ( mo.)		
03 Prepaid Interest ( per day from to )		
04 Property Taxes ( mo.)		
05		
<b>G. Initial Escrow Payment at Closing</b>		
01 Homeowner's Insurance	per month for mo.	
02 Mortgage Insurance	per month for mo.	
03 Property Taxes	per month for mo.	
04		
05		
06		
07		
08 Aggregate Adjustment		
<b>H. Other</b>		
01 Abstract or Title Search Fee	to Title Services	\$ 425.00
02 Commission	to RE/MAX Revolution	\$ 6,500.00
03 Commission	to Keller Williams	\$ 7,500.00
04		
05 Courier Fee	to Wasker, Dorr, Wimmer & Marcol	\$ 40.00
06 Document Preparation	to Leanne K Krell	\$ 75.00
07		
08		
09 Property Transaction Fee	to Remax Revolution	\$ 525.00
<b>J. TOTAL CLOSING COSTS</b>		\$ 15,464.20



# Closing Cost Details

Loan Costs	Seller-Paid	
	At Closing	Before Closing
<b>A. Origination Charges</b>		
01 % of Loan Amount (Points)		
02		
03		
04		
05		
06		
07		
08		
<b>B. Services Borrower Did Not Shop For</b>		
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
<b>C. Services Borrower Did Shop For</b>		
01		
02		
03		
04		
05		
06		
07		
08		



## Other Costs

<b>E. Taxes and Other Government Fees</b>			
01 Recording Fees	Deed: Mortgage:		
02 Revenue Stamps	to County Recorder	\$ 399.20	
<b>F. Prepays</b>			
01 Homeowner's Insurance Premium ( mo.)			
02 Mortgage Insurance Premium ( mo.)			
03 Prepaid Interest ( per day from to )			
04 Property Taxes ( mo.)			
05			
<b>G. Initial Escrow Payment at Closing</b>			
01 Homeowner's Insurance	per month for mo.		
02 Mortgage Insurance	per month for mo.		
03 Property Taxes	per month for mo.		
04			
05			
06			
07			
08 Aggregate Adjustment			
<b>H. Other</b>			
01 Abstract or Title Search Fee	to Title Services	\$ 425.00	
02 Commission	to RE/MAX Revolution	\$ 6,500.00	
03 Commission	to Keller Williams	\$ 7,500.00	
04			
05 Courier Fee	to Wasker, Dorr, Wimmer & Marcol	\$ 40.00	
06 Document Preparation	to Leanne K Krell	\$ 75.00	
07			
08			
09 Property Transaction Fee	to Remax Revolution	\$ 525.00	
<b>J. TOTAL CLOSING COSTS</b>		\$ 15,464.20	



# Closing Disclosure Form Addendum

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**Borrower(s):**

Noah Sattler and Lindsay Sattler  
405 NW Morningside Drive  
Grimes, IA 50111

**Seller(s):**

Lucas L. Allsup and Amanda L. Allsup  
77666 Lansing Rd  
Anita, IA 50020

**Lender:** Wings Financial Credit Union  
**Settlement Agent:** Wasker, Dorr, Wimmer & Marcouiller, P.C.  
(515)283-1801  
**Settlement Date:** June 15, 2022  
**Property Location:** 405 NW Morningside Drive  
Grimes, IA 50111

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Payoffs Payee/Description	Seller-Paid	
	At Closing	Before Closing
PennyMac Mortgage		\$ 164,961.99
Payoff of First Mortgage Loan		
Loan Payoff	\$ 164,891.54	As of 06/20/22
Including additional interest for	-5	Days @ 14.090000 Per Diem/Day Plus 10 Extra Days

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**Confirm Receipt**

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\_\_\_\_\_  
Lucas L. Allsup

\_\_\_\_\_  
Amanda L. Allsup



# 1099 S

**SUBSTITUTE FORM 1099-S**  
**PROCEEDS FROM REAL ESTATE TRANSACTIONS**  
**FOR THE TAX YEAR: 2022**  
OMB No. 1545-0997

**SETTLEMENT AGENT/FILER'S NAME AND ADDRESS**

Wasker, Dorr, Wimmer & Marcouiller, P.C.  
4201 Westown Parkway, Ste. 250  
West Des Moines, IA 50266  
(515)283-1801

Filer's Federal Tax ID Number: 42-1388229  
File Number: REG127174-MDK

**SELLER/TRANSFEROR'S NAME AND ADDRESS**

Lucas L. Allsup  
Amanda L. Allsup  
77666 Lansing Rd  
Anita, IA 50020

Transferor's Federal Tax ID Number:

**IGNORE**

<b>1) Date of Closing:</b> June 15, 2022	<b>2) Gross Proceeds:</b> 250000.00	<b>4) X here if property or services received:</b>	<b>5) X here if foreign person:</b>	<b>6) Buyer's part of real estate tax:</b>
<b>3) Address or Legal Description:</b> 405 NW Morningside Drive/Grimes IA				

THIS IS IMPORTANT TAX INFORMATION AND IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. IF YOU ARE REQUIRED TO FILE A RETURN, A NEGLIGENCE PENALTY OR OTHER SANCTION MAY BE IMPOSED ON YOU IF THIS ITEM IS REQUIRED TO BE REPORTED AND THE IRS DETERMINES THAT IT HAS NOT BEEN REPORTED.

YOU ARE REQUIRED BY LAW TO PROVIDE WASKER, DORR, WIMMER & MARCOUILLER, P.C. WITH YOUR CORRECT FEDERAL TAX IDENTIFICATION NUMBER. IF YOU DO NOT PROVIDE WASKER, DORR, WIMMER & MARCOUILLER, P.C. WITH YOUR CORRECT FEDERAL TAX IDENTIFICATION NUMBER, YOU MAY BE SUBJECT TO CIVIL OR CRIMINAL PENALTIES IMPOSED BY LAW.

## Instructions for Transferor

For sales or exchanges of certain real estate, the person responsible for closing a real estate transaction must report the real estate proceeds to the IRS and must furnish this statement to you. To determine if you have to report the sale or exchange of your main home on your tax return, see the Instructions for Schedule D (Form 1040 or 1040-SR). If the real estate was not your main home, report the transaction on Form 4797, Form 6252, and/or the Schedule D for the appropriate income tax form. If box 4 is checked and you received or will receive like-kind property, you must file Form 8824.

**Federal mortgage subsidy.** You may have to recapture (pay back) all or part of a federal mortgage subsidy if all the following apply.

- You received a loan provided from the proceeds of a qualified mortgage bond or you received a mortgage credit certificate.
- Your original mortgage loan was provided after 1990.
- You sold or disposed of your home at a gain during the first 9 years after you received the federal mortgage subsidy.
- Your income for the year you sold or disposed of your home was over a specified amount.

This will increase your tax. See Form 8828 and Pub. 523.

**Transferor's taxpayer identification number (TIN).** For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the issuer has reported your complete TIN to the IRS.

**Account number.** May show an account or other unique number the filer assigned to distinguish your account.

**Box 1.** Shows the date of closing.

**Box 2.** Shows the gross proceeds from a real estate transaction, generally the sales price. Gross proceeds include cash and notes payable to you, notes assumed by the transferee (buyer), and any notes paid off at settlement. Box 2 does not include the value of other property or services you received or will receive. See Box 4.

**Box 3.** Shows the address or legal description of the property transferred.

**Box 4.** If checked, shows that you received or will receive services or property (other than cash or notes) as part of the consideration for the property transferred. The value of any services or property (other than cash or notes) is not included in box 2.

**Box 5.** If checked, shows that you are a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust).

**Box 6.** Shows certain real estate tax on a residence charged to the buyer at settlement. If you have already paid the real estate tax for the period that includes the sale date, subtract the amount in box 6 from the amount already paid to determine your deductible real estate tax. But if you have already deducted the real estate tax in a prior year, generally report this amount as income on the "Other income" line of Schedule 1 (Form 1040 or 1040-SR). For more information, see Pub. 523, Pub. 525, and Pub. 530.

**JUST A COPY FOR YOUR  
SELLER TO KEEP... GIVE TO  
THEM**

For Paperwork Reduction Act Notice, see the 2022 Instructions for Forms 1099, 1098, 5498, and W-G2.

Department of the Treasury - Internal Revenue Service

(REG127174-MDK.PFD/REG127174-MDK/15)

# 1099 S

## SUBSTITUTE FORM 1099-S PROCEEDS FROM REAL ESTATE TRANSACTIONS FOR THE TAX YEAR: 2022 OMB No. 1545-0997

### SETTLEMENT AGENT/FILER'S NAME AND ADDRESS

Wasker, Dorr, Wimmer & Marcouiller, P.C.  
4201 Westown Parkway, Ste. 250  
West Des Moines, IA 50266  
(515)283-1801

Filer's Federal Tax ID Number: 42-1388229  
File Number: REG127174-MDK

### SELLER/TRANSFEROR'S NAME AND ADDRESS

Lucas L. Allsup  
Amanda L. Allsup  
77666 Lansing Rd  
Anita, IA 50020

Transferor's Federal Tax ID Number:

1099-S Form - A form 1099-S is a tax document used to ensure that the full amount received for a real estate sale of some kind is accurately reported. When real estate is sold, the seller is often subject to a capital gains tax.

1) Date of Closing: June 15, 2022	2) Gross Proceeds: 250000.00	4) X here if property or services received:	5) X here if foreign person:	6) Buyer's part of real estate tax:
3) Address or Legal Description: 405 NW Morningside Drive/Grimes IA				

THIS IS IMPORTANT TAX INFORMATION AND IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. IF YOU ARE REQUIRED TO FILE A RETURN, A NEGLIGENCE PENALTY OR OTHER SANCTION MAY BE IMPOSED ON YOU IF THIS ITEM IS REQUIRED TO BE REPORTED AND THE IRS DETERMINES THAT IT HAS NOT BEEN REPORTED.

YOU ARE REQUIRED BY LAW TO PROVIDE WASKER, DORR, WIMMER & MARCOUILLER, P.C. WITH YOUR CORRECT FEDERAL TAX IDENTIFICATION NUMBER. IF YOU DO NOT PROVIDE WASKER, DORR, WIMMER & MARCOUILLER, P.C. WITH YOUR CORRECT FEDERAL TAX IDENTIFICATION NUMBER, YOU MAY BE SUBJECT TO CIVIL OR CRIMINAL PENALTIES IMPOSED BY LAW.

UNDER PENALTIES OF PERJURY, I CERTIFY THAT THE NUMBER SHOWN ABOVE ON THIS STATEMENT IS MY CORRECT FEDERAL TAX IDENTIFICATION NUMBER. I ACKNOWLEDGE RECEIPT OF A COPY OF THIS STATEMENT.

Lucas L. Allsup \_\_\_\_\_ Date  
You MUST enter your Federal Tax Identification Number above.

Amanda L. Allsup \_\_\_\_\_ Date

Sign and return a copy of this form immediately to Wasker, Dorr, Wimmer & Marcouiller, P.C..

### Instructions for Transferor

For sales or exchanges of certain real estate, the person responsible for closing a real estate transaction must report the real estate proceeds to the IRS and must furnish this statement to you. To determine if you have to report the sale or exchange of your main home on your tax return, see the Instructions for Schedule D (Form 1040 or 1040-SR). If the real estate was not your main home, report the transaction on Form 4797, Form 6252, and/or the Schedule D for the appropriate income tax form. If box 4 is checked and you received or will receive like-kind property, you must file Form 8824.

**Federal mortgage subsidy.** You may have to recapture (pay back) all or part of a federal mortgage subsidy if all the following apply.

- You received a loan provided from the proceeds of a qualified mortgage bond or you received a mortgage credit certificate.
- Your original mortgage loan was provided after 1990.
- You sold or disposed of your home at a gain during the first 9 years after you received the federal mortgage subsidy.
- Your income for the year you sold or disposed of your home was over a specified amount.

This will increase your tax. See Form 8828 and Pub. 523.

**Transferor's taxpayer identification number (TIN).** For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the issuer has reported your complete TIN to the IRS.

**Account number.** May show an account or other unique number the filer assigned to distinguish your account.

**Box 1.** Shows the date of closing.

**Box 2.** Shows the gross proceeds from a real estate transaction, generally the sales price. Gross proceeds include cash and notes payable to you, notes assumed by the transferee (buyer), and any notes paid off at settlement. Box 2 does not include the value of other property or services you received or will receive. See Box 4.

**Box 3.** Shows the address or legal description of the property transferred.

**Box 4.** If checked, shows that you received or will receive services or property (other than cash or notes) as part of the consideration for the property transferred. The value of any services or property (other than cash or notes) is not included in box 2.

**Box 5.** If checked, shows that you are a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust).

**Box 6.** Shows certain real estate tax on a residence charged to the buyer at settlement. If you have already paid the real estate tax for the period that includes the sale date, subtract the amount in box 6 from the amount already paid to determine your deductible real estate tax. But if you have already deducted the real estate tax in a prior year, generally report this amount as income on the "Other income" line of Schedule 1 (Form 1040 or 1040-SR). For more information, see Pub. 523, Pub. 525, and Pub. 530.

# 1099 S EXEMPTION

## CERTIFICATION FOR NO INFORMATION REPORTING ON THE SALE OR EXCHANGE OF A PRINCIPAL RESIDENCE

This form may be completed by the seller of a principal residence. This information is necessary to determine whether the sale or exchange should be reported to the seller, and to the Internal Revenue Service on Form 1099-S, Proceeds From Real Estate Transactions. If the seller properly completes Parts I and III, and makes a "true" response to assurances (1) through (6) in Part II (or a "not applicable" response to assurance (6)), no information reporting to the seller or to the Service will be required for that seller. The term "seller" includes each owner of the residence that is sold or exchanged. Thus, if a residence has more than one owner, a real estate reporting person must either obtain a certification from each owner (whether married or not) or file an information return and furnish a payee statement for any owner that does not make the certification.

### Part I. Seller Information

1. Name: Lucas L. Allsup
2. Address or legal description (including city, state, and ZIP code) of residence being sold or exchanged
3. Taxpayer Identification Number (TIN):

If the sellers of real estate are EXEMPT from reporting their sale on a 1099-S, then they provide a Certification of No Reporting to the settlement agent.

### Part II. Seller Assurances

Check "true" or "false" for assurances (1) through (5), and "true", "false", or "not applicable" for assurance (6).

True False

(1) I owned and used the residence as my principal residence for periods aggregating 2 years or more during the 5-year period ending on the date of the sale or exchange of the residence.

(2) I have not sold or exchanged another principal residence during the 2-year period ending on the date of the sale or exchange of the residence.

(3) I (or my spouse or former spouse, if I was married at any time during the period beginning after May 6, 1997, and ending today) have not used any portion of the residence for business or rental purposes after May 6, 1997.

(4) At least one of the following three statements applies:

The sale or exchange is of the entire residence for \$250,000 or less.

OR

I am married, the sale or exchange is of the entire residence for \$500,000 or less, and the gain on the sale or exchange of the entire residence is \$250,000 or less.

OR

I am married, the sale or exchange is of the entire residence for \$500,000 or less, and (a) I intend to file a joint return for the year of the sale or exchange, (b) my spouse also used the residence as his or her principal residence for periods aggregating 2 years or more during the 5-year period ending on the date of the sale or exchange of the residence, and (c) my spouse also has not sold or exchanged another principal residence during the 2-year period ending on the date of the sale or exchange of the principal residence.

(5) During the 5-year period ending on the date of the sale or exchange of the residence, I did not acquire the residence in an exchange to which section 1031 of the Internal Revenue Code applied.

True False N/A

(6) If my basis in the residence is determined by reference to the basis in the hands of a person who acquired the residence in an exchange to which section 1031 of the Internal Revenue Code applied, the exchange to which section 1031 applied occurred more than 5 years prior to the date I sold or exchanged the residence.

### Part III. Seller Certification

Under penalties of perjury, I certify that all the above information is true as of the end of the day of the sale or exchange.

Lucas L. Allsup

\_\_\_\_\_  
Date

# 1099 S EXEMPTION

## CERTIFICATION FOR NO INFORMATION REPORTING ON THE SALE OR EXCHANGE OF A PRINCIPAL RESIDENCE

This form may be completed by the seller of a principal residence. This information is necessary to determine whether the sale or exchange should be reported to the seller, and to the Internal Revenue Service on Form 1099-S, Proceeds From Real Estate Transactions. If the seller properly completes Parts I and III, and makes a "true" response to assurances (1) through (6) in Part II (or a "not applicable" response to assurance (6)), no information reporting to the seller or to the Service will be required for that seller. The term "seller" includes each owner of the residence that is sold or exchanged. Thus, if a residence has more than one owner, a real estate reporting person must either obtain a certification from each owner (whether married or not) or file an information return and furnish a payee statement for any owner that does not make the certification.

### Part I. Seller information

1. Name: Amanda L. Allsup **ONE FOR EACH SELLER SOMETIMES**
2. Address or legal description (including city, state, and ZIP code) of residence being sold or exchanged
3. Taxpayer Identification Number (TIN):

### Part II. Seller Assurances

Check "true" or "false" for assurances (1) through (5), and "true", "false", or "not applicable" for assurance (6).

True False

- |                                     |                          |                                                                                                                                                                                                                                   |
|-------------------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | (1) I owned and used the residence as my principal residence for periods aggregating 2 years or more during the 5-year period ending on the date of the sale or exchange of the residence.                                        |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | (2) I have not sold or exchanged another principal residence during the 2-year period ending on the date of the sale or exchange of the residence.                                                                                |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | (3) I (or my spouse or former spouse, if I was married at any time during the period beginning after May 6, 1997, and ending today) have not used any portion of the residence for business or rental purposes after May 6, 1997. |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | (4) At least one of the following three statements applies:                                                                                                                                                                       |

The sale or exchange is of the entire residence for \$250,000 or less.

OR

I am married, the sale or exchange is of the entire residence for \$500,000 or less, and the gain on the sale or exchange of the entire residence is \$250,000 or less.

OR

I am married, the sale or exchange is of the entire residence for \$500,000 or less, and (a) I intend to file a joint return for the year of the sale or exchange, (b) my spouse also used the residence as his or her principal residence for periods aggregating 2 years or more during the 5-year period ending on the date of the sale or exchange of the residence, and (c) my spouse also has not sold or exchanged another principal residence during the 2-year period ending on the date of the sale or exchange of the principal residence.

- |                                     |                          |                                                                                                                                                                                                      |
|-------------------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | (5) During the 5-year period ending on the date of the sale or exchange of the residence, I did not acquire the residence in an exchange to which section 1031 of the Internal Revenue Code applied. |
|-------------------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

True False N/A

- |                                     |                          |                          |                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | (6) If my basis in the residence is determined by reference to the basis in the hands of a person who acquired the residence in an exchange to which section 1031 of the Internal Revenue Code applied, the exchange to which section 1031 applied occurred more than 5 years prior to the date I sold or exchanged the residence. |
|-------------------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Part III. Seller Certification

Under penalties of perjury, I certify that all the above information is true as of the end of the day of the sale or exchange.

Amanda L. Allsup

\_\_\_\_\_  
Date

# REQ TO CLOSE ACCT

WASKER, DORR, WIMMER & MARCOUILLER, P.C.  
ATTORNEYS AT LAW

Highland Building - Three Fountains Office Park  
4201 Westown Parkway, Suite 250  
West Des Moines, Iowa 50266-6720

Phone: (515) 283-1801  
Fax: (515) 283-1802  
Email: lawfirm@wdwm.net

## REQUEST TO CLOSE AND RELEASE MORTGAGE/LINE OF CREDIT ACCOUNT(S)

Seller may have had a home equity line of credit at some point and this is used to close that line of credit at closing.

Seller Name(s): Allsup, Lucas and Allsup, Amanda

Property Address: 405 Nw Morningside Drive, Grimes, Ia 50111

Lender Name: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Lender Name: \_\_\_\_\_

Loan Number: \_\_\_\_\_

I (We) hereby authorize the above mentioned lender(s) to close and release the mortgage(s)/line of credit(s) listed above. I (We) hereby further authorize the above mentioned lender(s) to discuss and disclose to Wasker Law Firm all information necessary to obtain any and all mortgage release(s) related to the subject loans(s).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# W9

W9 form in real estate generally means that a business who is paying you money needs your Social Security number so it can notify the IRS of the amount.

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

## Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

6 City, state, and ZIP code

7 List account number(s) here (optional)

Requester's name and address (optional)

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

				-							
--	--	--	--	---	--	--	--	--	--	--	--

or

Employer identification number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

### Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶ \_\_\_\_\_

Date ▶ \_\_\_\_\_

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

# FEES SHEET

Date: 06/15/2022

Used by Cindy to report fees to lender/attorney that need paid on the CD

**Closing Date:** 06/15/2022

**To:** Wasker Law **Attn:** Melissa Walk

**Buyers:** Noah Sattler and Lindsay Sattler

**Seller:** Lucas Allsup and Amanda Allsup

**Property Address:** 405 Northwest Morningside Drive, Grimes, IA 50111

## Details for HUD Preparation

**Sale Price:** 250,000.00 **Earnest Money:** 1500.00 **Held by:** Re/Max Revolution

## Seller's Forwarding Address:

77666 Lansing Rd., Anita, IA 50020

<b>Commission</b> 7% minus \$3500 from list side <b>Total</b> \$14,000.00	<b>To:</b> Re/Max Revolution  <b>To:</b> Keller Williams	\$ 6500.00  \$ 7500.00	<b>Sellers Charge</b>
<b>Termite Inspection</b>	Perfection Pest Mgmt	\$ POC	<b>Seller Charge</b>
<b>Home Warranty</b>	NONE	\$ 0.00	<b>Seller</b>
<b>Transaction Fee</b>	<b>Re/Max Revolution</b>	\$ 525.00	<b>Seller</b>
<b>Buyer Broker Compliance Fee</b>	<b>To:</b> Keller Williams	\$ 295.00	<b>Buyer</b>
<b>Abstract</b>	<b>To:</b> Title Services	\$ 350.00 \$	<b>Seller</b> <b>Buyer</b>
<b>Deed Prep</b>	<b>To:</b> LeAnne Krell Law	\$ 75.00	<b>Seller</b>
<b>Other:</b>	Seller Paid CC \$5000.00		

NOTHING FOR YOU TO DO WITH THIS PAGE CAN THROW AWAY





# GROUNDWATER

The GROUNDWATER statement provides information to the buyer (as well as others) with respect to the specific types of known hazards on the property. County Recorders typically time-stamp Groundwater Hazard Statements when filed and give them instrument numbers so that they can be included in the county real estate indexes.

## REAL ESTATE TRANSFER - GROUNDWATER HAZARD STATEMENT TO BE COMPLETED BY TRANSFEROR

### TRANSFEROR:

Name Lucas L. Allsup and Amanda L. Allsup

Address 77666 Lansing Rd., Anita, IA 50020

Number and Street or RR

City, Town or P.O.

State

Zip

### TRANSFeree:

Name Noah Sattler and Lindsay Sattler

Address 2704 Kenneth Court, Minnetonka, MN 55305

Number and Street or RR

City, Town or P.O.

State

Zip

Address of Property Transferred:

405 Northwest Morningside Drive, Grimes, IA 50111

Number and Street or RR

City, Town, or P.O.

State

Zip

Legal Description of Property: (Attach if necessary)

Lot 23 in PARKVIEW PLAZA PLAT NO. 1, an Official Plat, now included in and forming a part of the City of Grimes, Polk County, Iowa.

### 1. Wells (check one)

There are no known wells situated on this property.

There is a well or wells situated on this property. The type(s), location(s) and legal status are stated below or set forth on an attached separate sheet, as necessary.

HINT: Often it is the first one on each of these but your client needs to read and determine for themselves.

### 2. Solid Waste Disposal (check one)

There is no known solid waste disposal site on this property.

There is a solid waste disposal site on this property and information related thereto is provided in Attachment #1, attached to this document.

### 3. Hazardous Wastes (check one)

There is no known hazardous waste on this property.

There is hazardous waste on this property and information related thereto is provided in Attachment #1, attached to this document.

### 4. Underground Storage Tanks (check one)

There are no known underground storage tanks on this property. (Note exclusions such as small farm and residential motor fuel tanks, most heating oil tanks, cisterns and septic tanks, in instructions.)

There is an underground storage tank on this property. The type(s), size(s) and any known substance(s) contained are listed below or on an attached separate sheet, as necessary.

# GROUNDWATER

## 5. Private Burial Site (check one)

- There are no known private burial sites on this property.
- There is a private burial site on this property. The location(s) of the site(s) and known identifying information of the decedent(s) is stated below or on an attached separate sheet, as necessary.

## 6. Private Sewage Disposal System (check one)

HINT:  
IF REGULAR SEWER IT IS THE FIRST OPTION  
IF SEPTIC IT IS THE THIRD ONE

- All buildings on this property are served by a public or semi-public sewage disposal system.
- This transaction does not involve the transfer of any building which has or is required by law to have a sewage disposal system.
- There is a building served by private sewage disposal system on this property or a building without any lawful sewage disposal system. A certified inspector's report is attached which documents the condition of the private sewage disposal system and whether any modifications are required to conform to standards adopted by the Department of Natural Resources. A certified inspection report must be accompanied by this form when recording.
- There is a building served by private sewage disposal system on this property. Weather or other temporary physical conditions prevent the certified inspection of the private sewage disposal system from being conducted. The buyer has executed a binding acknowledgment with the county board of health to conduct a certified inspection of the private sewage disposal system at the earliest practicable time and to be responsible for any required modifications to the private sewage disposal system as identified by the certified inspection. A copy of the binding acknowledgment is attached to this form.
- There is a building served by private sewage disposal system on this property. The buyer has executed a binding acknowledgment with the county board of health to install a new private sewage disposal system on this property within an agreed upon time period. A copy of the binding acknowledgment is provided with this form.
- There is a building served by private sewage disposal system on this property. The building to which the sewage disposal system is connected will be demolished without being occupied. The buyer has executed a binding acknowledgment with the county board of health to demolish the building within an agreed upon time period. A copy of the binding acknowledgment is provided with this form. [Exemption #9]
- This property is exempt from the private sewage disposal inspection requirements pursuant to the following exemption [Note: for exemption #9 use prior check box]: \_\_\_\_\_.
- The private sewage disposal system has been installed within the past two years pursuant to permit number \_\_\_\_\_.

Information required by statements checked above should be provided here or on separate sheets attached hereto:

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I HEREBY DECLARE THAT I HAVE REVIEWED THE INSTRUCTIONS FOR THIS FORM  
AND THAT THE INFORMATION STATED ABOVE IS TRUE AND CORRECT.

Signature: \_\_\_\_\_ Telephone No.: (\_\_\_\_) \_\_\_\_\_  
(Transferor or Agent)





Part II - TO BE COMPLETED BY THE ASSESSOR

Assessed values must be as of January 1 of the year in which the sale occurred.

SECTION A: SINGLE CLASSIFICATION

Primary Classification: Residential (4); Commercial (5); Industrial (2); Agricultural (1); Multi-residential (7)

City/Township:

Occupancy:

Primary Parcel Number: \_\_\_\_\_

Year Built:

Class	Land	Building	Dwelling
Res	<input type="text"/> .00	<input type="text"/> .00	<input type="text"/> .00
Com	<input type="text"/> .00	<input type="text"/> .00	
Ind	<input type="text"/> .00	<input type="text"/> .00	
Ag	<input type="text"/> .00	<input type="text"/> .00	<input type="text"/> .00
MultiRes	<input type="text"/> .00	<input type="text"/> .00	<input type="text"/> .00

Subtotal ..... .00

SECTION B: DUAL CLASSIFICATION

Primary Classification: Commercial (5); Industrial (2); Multi-residential (7)

City/Township:

Occupancy:

Primary Parcel Number: \_\_\_\_\_

Year Built:

Class	Land	Building	Dwelling
Com	<input type="text"/> .00	<input type="text"/> .00	
Ind	<input type="text"/> .00	<input type="text"/> .00	
MultiRes	<input type="text"/> .00	<input type="text"/> .00	<input type="text"/> .00

Subtotal ..... .00

Total: Add Subtotal amounts from Sections A and B ..... .00

Enter amount from line 3, page 1 ..... .00

Ratio: Divide Total amount by the amount on line 3, page 1 .....  %

NOT FOR US TO FILL OUT FOR ASSESSORS OFFICE

NUTC

Jurisdiction

Comments: \_\_\_\_\_

LEAVE BLANK





# Real Estate Transfer – Declaration of Value Instructions

Visit the Department website at <https://tax.iowa.gov> for more information.

**FILING INSTRUCTIONS:** Iowa law requires that a “Declaration of Value” statement reflecting the full consideration paid in certain nonexempt real estate conveyances be submitted to the county recorder at the time a deed, contract, instrument, or other writing is presented for recording. The blank area at the top of page 1 of form 57-006, Real Estate Transfer- Declaration of Value, is for use by the county recorder. In this area the recorder will provide the following information: Date of Recording, Book and Page Number or Instrument Number, County, or Real Estate Transfer Tax. Part I of the form is the prescribed “Declaration of Value” statement that must be completed by the buyer or seller or either’s agent for nonexempt transactions. Part II of the form is to be completed only by the assessor.

**IMPORTANT:** This form does not have to be completed for any document presented for recording which clearly indicates on such document that it is an exempt transaction. Refer to Iowa Administrative Code 701-79.5. If the transaction is exempt, but the reason for exemption is not stated on the actual document presented for recording, Part I of this form must be completed. If this form is not completed accurately and completely for nonexempt transactions by the buyer or seller or either’s agent, the county recorder is required by law to refuse to record the contract, deed or other instrument conveying the affected property.

**TYPE OF SALE:** Enter the number corresponding to your selection in the box at the end of the line on page 1, if applicable. For purposes of indicating a “Sale Between Family Members” **only** the following relationships are to be considered:

Mother	Mother-in-law	Foster brother	Brother-in-law	Grandson	Stepfather
Daughter	Daughter-in-law	Foster sister	Stepbrother	Granddaughter	Stepson
Sister	Niece	Father	Father-in-law	Grandfather	Stepdaughter
Sister-in-law	Foster child	Son	Son-in-law	Grandmother	Uncle
Stepsister	Foster parent	Brother	Nephew	Stepmother	Aunt

## DECLARATION OF VALUE STATEMENT:

**Line 1. Total Amount Paid:** Enter the entire and full purchase price of the property transferred, including down payment.

**Note:** Reporting of personal property should conform to the transfer document and any related income tax filings.

**Line 2. Amount Paid for Personal Property:** Enter the amount of the purchase price that was paid for personal property. For residential sales, personal property includes items that are not attached (“built in”) to the home that are normally removed by the owner, when he or she vacates. This includes, but is not limited to, items such as washers, dryers, drapes, stoves, refrigerators, and portable dishwashers. Personal property for commercial or industrial sales includes inventories, as well as equipment and fixtures classified and assessed as personal property. Reporting of personal property should conform to the transfer document and any related income tax filings.

**Line 3. Amount Paid for Real Property Only:** Subtract Line 2 from Line 1 and enter the difference here.

# INSTRUCTIONAL ONLY - PRETTY MUCH JUST TRASH

**IMPORTANT:** If this transaction is exempt from the transfer tax, you may not be required to complete this form. Exemption numbers 1, 6, 14, or 15 require a Declaration of Value form to be completed.

### Exceptions Iowa Code 428A.2

1. **(DOV required)** Any executory contract for the sale of land under which the vendee is entitled to or does take possession thereof, or any assignment or cancellation thereof.
2. Any instrument of mortgage, assignment, extension, partial release, or satisfaction thereof.
3. Any will.
4. Any plat.
5. Any lease.
6. **(DOV required for federal agency or instrumentality)** Any deed, instrument, or writing in which the United States or any agency or instrumentality thereof or the state of Iowa or any agency, instrumentality, or governmental or political subdivision thereof is the grantor, assignor, transferor, or conveyor; and any deed, instrument or writing in which any of such unit of government is the grantee or assignee where there is no consideration.
7. Deeds for cemetery lots.
8. Deeds which secure a debt or other obligation, except those included in the sale of real property.
9. Deeds for the release of a security interest in property excepting those pertaining to the sale of real estate.
10. Deeds which, without additional consideration, confirm, correct, modify or supplement a deed previously recorded.
11. Deeds between husband and wife, or parent and child, without actual consideration. A cancellation of indebtedness alone which is secured by the property being transferred and which is not greater than the fair market value of the property being transferred is not actual consideration within the meaning of this subsection.
12. Tax deeds.
13. Deeds of partition where the interest conveyed is without consideration. However, if any of the parties take shares greater in value than their undivided interest a tax is due on the greater values, computed at the rate set out in section 428A.1.
14. **(DOV required)** The making or delivering of instruments of transfer resulting from a corporate merger, consolidation, or reorganization or a

merger, consolidation, or reorganization of a limited liability company under the laws of the United States or any state thereof, where such instrument states such fact on the face thereof.

15. **(DOV required)** Deeds between a family corporation, partnership, limited partnership, limited liability partnership, or limited liability company and its stockholders, partners, or members for the purpose of transferring real property in an incorporation or corporate dissolution or the organization or dissolution of a partnership, limited partnership, limited liability partnership, or limited liability company under the laws of this state, where the deeds are given for no actual consideration other than for shares or for debt securities of the corporation, partnership, limited partnership, limited liability partnership, or limited liability company. For purposes of this subsection, a family corporation, partnership, limited partnership, limited liability partnership, or limited liability company is a corporation, partnership, limited partnership, limited liability partnership, or limited liability company where the majority of the voting stock of the corporation, or of the ownership shares of the partnership, limited partnership, limited liability partnership, or limited liability company is held by and the majority of the stockholders, partners, or members are persons related to each other as spouse, parent, grandparent, lineal ascendants of grandparents or their spouses and other lineal descendants of the grandparents or their spouses, or persons acting in a fiduciary capacity for persons so related and where all of its stockholders, partners, or members are natural persons or persons acting in a fiduciary capacity for the benefit of natural persons.

16. Deeds for the transfer of property or the transfer of an interest in property when the deed is executed between former spouses pursuant to a decree of dissolution of marriage.

17. Deeds transferring easements.

18. Deeds giving back real property to lienholders in lieu of forfeitures or foreclosures.

19. Deeds executed by public officials in the performance of their official duties.

20. Deeds transferring distributions of assets to heirs at law or devisees under a will.

21. Deeds in which the consideration is five hundred dollars or less.

# TAX PRO

## (tax proration)

RE/MAX REVOLUTION  
932 N SHADYVIEW BLVD  
PLEASANT HILL, IA 50327



### REAL ESTATE TAX AGREEMENT

Property tax proration is dividing property taxes evenly between the buyer and the seller. Sellers will take responsibility for the property taxes up until the day the property is officially sold. The buyer takes on the property taxes from the day the purchase is final.

The undersigned Seller and Buyer of the real estate located at 405 Northwest Morningside Drive, Grimes, IA 50111 hereby agree that the following constitutes the Sellers total tax liability and is the final settlement for property taxes.

#### Current Taxes:

Based on Annual tax amount of \$	<u>4093.00</u>		
First Installment due and payable:	<u>Sept. 2021-PD</u>	\$	<u>0.00</u>
Second Installment due and payable:	<u>March 2022-PD</u>	\$	<u>0.00</u>
Proration adjustment for projected settlement date of <u>06/15/2022</u>			
<u>349</u> days @ <u>11.21</u> per day		\$	<u>3,913.58</u>
	<b>TOTAL</b>	\$	<u>3,913.58</u>

In the event of a change in the settlement date, this amount will be adjusted, based on a per diem of \$ 11.21

SPECIAL ASSESSMENTS DUE AND PAYABLE None \$                     

PRELIMINARY SPECIAL ASSESSMENTS None \$                     

The parties waive any claims they may now, or in the future have against each other or RE/MAX Revolution, arising from the real estate tax adjustment, any Special Assessments not yet shown in the abstract or for errors caused by any misinformation furnished by third parties.

Seller: Lucas Allsup

Buyer: Noah Sattler

Seller: Amanda Allsup

Buyer: Lindsay Sattler



# Composite Mortgage Affidavit

(Owner/Seller)

The Composite Mortgage Affidavit (CMA) provides a uniform method of documenting certain underwriting information concerning mechanics' liens, survey matters, unrecorded easements, possession rights and violations of restrictions. The CMA is intended to provide confirming evidence that, to the knowledge of the buyers and sellers of the property, there are no apparent problems in these areas. If problems are revealed on the CMA, further inquiry may be necessary. The CMA is required when issuing lender or owner certificate(s).

Commitment No. C-220027733

Loan No. 22-00046632

Property Address ("Property"): 405 NW Morningside Dr, GRIMES, IA 50111

To be completed by the current owner(s) if a refinance transaction or seller(s) if a purchase transaction.

The undersigned, being first duly sworn on oath (or upon affirmation), deposes and states as to the Property:

1. Has any labor, material, or equipment been furnished on the Property in the last 90 days?  
 None     Yes, as follows: \_\_\_\_\_
2. Are you aware or have you received notice of any public improvements or services that would constitute a special assessment on the Property after the date of closing (e.g. sidewalks, curbs, streets, sewer, lawn care, delinquent water bills)?  
 None     Yes, as follows: \_\_\_\_\_
3. Are there any unrecorded contracts, mortgages, options, covenants, conditions, restrictions, leases, easements, agreements or other interests that affect the Property (e.g. shared driveway agreements, access easements)?  
 None     Yes, as follows: \_\_\_\_\_
4. Do any improvements located on the Property encroach into setback lines or easements of the Property or onto neighboring property?  
 None     Yes, as follows: \_\_\_\_\_
5. Do any neighboring improvements, including but not limited to, buildings, fences, walkways, driveways, eaves and drains encroach upon the Property?  
 None     Yes, as follows: \_\_\_\_\_
6. Do any of the neighboring property owners dispute the location of boundary lines?  
 None     Yes, as follows: \_\_\_\_\_
7. Are you aware or have you received notice of any violations of covenants, conditions or restrictions, including but not limited to, delinquent dues or unpaid special assessments?  
 None     Yes, as follows: \_\_\_\_\_
8. Are there any persons in actual possession or claiming a right to possession of the Property or any part thereof, other than yourself?  
 None     Yes, as follows: \_\_\_\_\_
9. Have you obtained in the last 90 days, or will you obtain prior to closing, any mortgages, lines of credit, or bridge loans on the Property?  
 None     Yes, as follows: \_\_\_\_\_
10. Are there any judgments, liens, claims or pending lawsuits against you?  
 None     Yes, as follows: \_\_\_\_\_
11. Are there any pending bankruptcy proceedings involving you?  
 None     Yes, as follows: \_\_\_\_\_



# CMA

12. My marital status is:

- single
- married to each other
- married to: \_\_\_\_\_
- N/A (e.g., entity, trust, conservatorship, etc.)

13. I, the owner/seller, or the owner/seller's spouse, have disclosed all matters based on information known or reasonably available to me and certify that all matters stated herein are true and accurate. I make the above statements for the purpose of inducing Iowa Title Guaranty to issue a lender and/or owner certificate with respect to the Property. I hereby indemnify and hold harmless Iowa Title Guaranty against any and all loss, costs, damages and expenses or every kind, including but not limited to attorney's fees, incurred by Iowa Title Guaranty by reason of its reliance on the statements made herein.

**Note: All titleholders and spouses, if any, must execute the Composite Mortgage Affidavit.**

Sign: \_\_\_\_\_  
Print: Lucas L. Allsup

Sign: \_\_\_\_\_  
Print: Amanda L. Allsup

Sign: \_\_\_\_\_  
Print: \_\_\_\_\_

Sign: \_\_\_\_\_  
Print: \_\_\_\_\_

STATE OF \_\_\_\_\_, COUNTY OF COUNTY YOUR FEET ARE IN WHEN YOU SIGN

Signed and sworn to (or affirmed) before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by  
NAME OF THE PEOPLE WHO THE NOTARY WATCHED SIGN THIS DOCUMENT

**MUST BE NOTARIZED!!!!!!!**

Signature of Notary Public

STATE OF \_\_\_\_\_, COUNTY OF \_\_\_\_\_

Signed and sworn to (or affirmed) before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by  
\_\_\_\_\_

**USE ONLY IF YOU HAVE TWO NOTARIES BECAUSE  
SELLER SIGNED AT DIFFERENT TIMES**

\_\_\_\_\_  
Signature of Notary Public

FACTS	WHAT DOES IOWA TITLE GUARANTY DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>• Social Security number and payment history</li> <li>• Credit card or other debt and mortgage rates and payments</li> <li>• Employment information and wire transfer instructions</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>
How?	All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Iowa Title Guaranty chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Iowa Title Guaranty share?	Can you limit this sharing?
<b>For our everyday business purposes –</b> such as to process your transaction, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
<b>For our marketing purposes –</b> to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don’t share
<b>For our affiliates’ everyday business purposes –</b> information about your transactions and experiences	Yes	No
<b>For our affiliates’ everyday business purposes –</b> information about your creditworthiness	No	We don’t share
<b>For our affiliates to market to you</b>	No	We don’t share
<b>For our affiliates to market to you</b>	No	We don’t share

For more information: Call (515) 452-0484 or go to [www.iowatitleguaranty.com](http://www.iowatitleguaranty.com)

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<b>Page 2</b>	
<b>Who we are</b>	
<b>Who is providing this notice?</b>	Iowa Title Guaranty
<b>What we do</b>	
<b>How does Iowa Title Guaranty protect my personal information?</b>	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
<b>How does Iowa Title Guaranty collect my personal information?</b>	<p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Apply for insurance or pay insurance premiums</li> <li>• File an insurance claim or give us your contact information</li> <li>• Provide your mortgage information</li> <li>• We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</li> </ul>
<b>Why can't I limit all sharing?</b>	<p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>• affiliates form using your information to market to you</li> <li>• sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>
<b>Definitions</b>	
<b>Affiliates</b>	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <p><i>Iowa Title Guaranty is a division of Iowa Finance Authority.</i></p>
<b>Nonaffiliates</b>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <p><i>Iowa Title Guaranty does not share with nonaffiliates for marketing purposes.</i></p>
<b>Joint marketing</b>	<p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <p><i>Iowa Title Guaranty does not jointly market with nonaffiliated financial companies.</i></p>

**INSTRUCTIONAL ONLY -  
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<b>Section I. General Information</b> Inspection Company, Address & Phone  <b>Perfection Pest Management</b> PO Box 158 Indiana, IA 50125 515-961-0461	Company's Pest Control Business Lic. No. <b>08021-001</b>	Date of Inspection <b>06/06/22</b>
	Address of Property Inspected <b>405 NW Morningside Dr, Grimes, IA 50111</b>	

Inspector's Name, Signature & Certification, Registration, or Lic. # <b>Allen Lehman,</b> <b>23578 7a,7b,7d</b>	WDI report is conducted by a licensed technician, who will document either the presence or absence of wood-destroying insects in the property. In addition to looking for current termite activity, a professional will also seek out evidence of past infestations	Structure(s) Inspected House detached garage & shed
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**Section II. Inspection Findings** This report is indicative of the condition of the above identified structure(s) on the date of inspection and is not to be construed as a guarantee or warranty against latent, concealed, or future infestations or wood destroying insect damage.

**Based on a careful visual inspection of the readily accessible areas of the structure(s) inspected:**

**A. No visible** evidence of wood destroying insects was observed.

**B. Visible evidence of wood destroying insects was observed as follows:**

1. Live insects (description and location):

2. Dead insects, insect parts, frass, shelter tubes, exit holes, or staining (description and location):  
Subterranean termite shelter tubes found in shed.

3. Visible damage from wood destroying insects was noted as follows(description and location):

**NOTE: This is not a structural damage report. If box B above is checked, it should be understood that some degree of damage, including hidden damage, may be present.** If any questions arise regarding damage indicated by this report, it is recommended that the buyer or any interested parties contact a qualified structural professional to determine the extent of damage and the need for repairs.

**Section III. Recommendations**


No action and/or treatment recommended: (Explain if Box B in Section II is checked)  
Property has been under monitoring warranty with Perfection Pest 6/17-12/22.

Recommend action(s) and/or treatment(s) for the control of:

<p><b>Section IV. Obstructions and Inaccessible Areas</b> The following areas of the structure(s) inspected were obstructed or inaccessible:</p> <p><input checked="" type="checkbox"/> Basement 1, 3, 4, 6, 7, 9, 24</p> <p><input checked="" type="checkbox"/> Crawlspace 5, 11, 24</p> <p><input checked="" type="checkbox"/> Main Level 1, 3, 4, 6, 7, 9</p> <p><input type="checkbox"/> Attic</p> <p><input checked="" type="checkbox"/> Garage 3, 6, 7, 24</p> <p><input checked="" type="checkbox"/> Exterior 17</p> <p><input checked="" type="checkbox"/> Porch 12</p> <p><input type="checkbox"/> Addition</p> <p><input checked="" type="checkbox"/> Other Shed 6,7 wood to soil contact</p>	<p><b>The inspector may write out obstructions or use the following optional key:</b></p> <table border="0"> <tr> <td>1. Fixed ceiling</td> <td>15. Standing water</td> </tr> <tr> <td>2. Suspended ceiling</td> <td>16. Dense vegetation</td> </tr> <tr> <td>3. Fixed wall covering</td> <td>17. Exterior siding</td> </tr> <tr> <td>4. Floor covering</td> <td>18. Window well covers</td> </tr> <tr> <td>5. Insulation</td> <td>19. Wood pile</td> </tr> <tr> <td>6. Cabinets or shelving</td> <td>20. Snow</td> </tr> <tr> <td>7. Stored items</td> <td>21. Unsafe conditions</td> </tr> <tr> <td>8. Furnishings</td> <td>22. Rigid foam board</td> </tr> <tr> <td>9. Appliances</td> <td>23. Synthetic stucco</td> </tr> <tr> <td>10. No access or entry</td> <td>24. Duct work, plumbing and /or wiring</td> </tr> <tr> <td>11. Limited access</td> <td>25. Spray foam insulation</td> </tr> <tr> <td>12. No access beneath</td> <td>26. Equipment</td> </tr> <tr> <td>13. Only visual access</td> <td></td> </tr> <tr> <td>14. Cluttered condition</td> <td></td> </tr> </table>	1. Fixed ceiling	15. Standing water	2. Suspended ceiling	16. Dense vegetation	3. Fixed wall covering	17. Exterior siding	4. Floor covering	18. Window well covers	5. Insulation	19. Wood pile	6. Cabinets or shelving	20. Snow	7. Stored items	21. Unsafe conditions	8. Furnishings	22. Rigid foam board	9. Appliances	23. Synthetic stucco	10. No access or entry	24. Duct work, plumbing and /or wiring	11. Limited access	25. Spray foam insulation	12. No access beneath	26. Equipment	13. Only visual access		14. Cluttered condition	
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**Section V. Additional Comments and Attachments** (these are an integral part of the report)

Attachments:

<p><b>Signature of Seller(s)</b> or Owner(s) if refinancing. Seller discloses to the buyer all information, to their knowledge, regarding W.D.I. infestation, damage, repair, and treatment history.</p> <p><b>ONLY ONE SELLER SIGNATURE</b></p> <p>X </p>	<p><b>Signature of Buyer.</b> The undersigned hereby acknowledges receipt of a copy of both page 1 and page 2 of this report and understands the information reported.</p> <p>X</p>
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## Important Consumer Information

### Regarding the Scope and Limitations of the Inspection

# PEST

Please read this entire page as it is part of this report. Please refer to the NPMA Suggested Guidelines for instructions on completing this report. This report is not a guarantee or warranty as to the absence of wood destroying insects nor is it a structural integrity report. The inspector's training and experience do not qualify the inspector in damage evaluation or any other building construction technology and/or repair.

- 1. About the Inspection:** A visual inspection was conducted in the readily accessible areas of the structure(s) indicated (see Page 1) including attics and crawlspaces which permitted entry during the inspection. The inspection included probing and/or sounding of unobstructed and accessible areas to determine the presence or absence of visual evidence of wood destroying insects. The WDI inspection firm is not responsible to repair any damage or treat any infestation at the structure(s) inspected, except as may be provided by separate contract. Also, wood destroying insect infestation and/or damage may exist in concealed or inaccessible areas. The inspection firm cannot guarantee that any wood destroying insect infestation and/or damage disclosed by this inspection represents all of the wood destroying insect infestation and/or damage which may exist as of the date of the inspection. **For purposes of this inspection, wood destroying insects include: termites, carpenter ants, carpenter bees, and reinfesting wood boring beetles. This inspection does not include mold, mildew or noninsect wood destroying organisms.** This report shall be considered invalid for purposes of securing a mortgage and/or settlement of property transfer if not used within ninety (90) days from the date of inspection. **This shall not be construed as a 90-day warranty. There is no warranty, express or implied, related to this report unless disclosed as required by state regulations or a written warranty or service agreement is attached.**
- 2. Treatment Recommendation Guidelines Regarding Subterranean Termites:** Treatment or corrective action should be recommended if live termites are found. If no evidence of a previous treatment is documented and evidence of infestation is found, even if no live termites are observed, treatment or corrective action by a licensed pest control company should be recommended. Treatment or corrective action may be recommended if evidence of infestation is observed, and a documented treatment occurred previously, unless the structure is under warranty or covered by a service agreement with a licensed pest control company. **For other Wood Destroying Insects, please refer to the NPMA suggested guidelines for added guidance on actions and or treatment.**
- 3. Obstructions and Inaccessible Areas:** No inspection was made in areas which required the breaking apart or into, dismantling, removal of any object, including but not limited to: moldings, floor coverings, wall coverings, siding, fixed ceilings, insulation, furniture, appliances, and/or personal possessions; nor were areas inspected which were obstructed or inaccessible for physical access on the date of inspection. Your inspector may write out inaccessible areas or use the key in Section IV. Crawl spaces, attics, and/or other areas may be deemed inaccessible if the opening to the area is not large enough to provide physical access for the inspector or if a ladder was required for access. Crawl spaces (or portions thereof) may also be deemed inaccessible if there is less than 24 inches of clearance from the bottom of the floor joists to the surface below. If any area which has been reported as inaccessible is made accessible, the inspection company may be contacted for another inspection. An additional fee may apply.
- 4. Consumer Maintenance Advisory Regarding Integrated Pest Management for Prevention of Wood Destroying Insects.** Any structure can be attacked by wood destroying insects. Homeowners should be aware of and try to eliminate conditions which promote insect infestation in and around their structure(s). Factors which may lead to wood destroying insect infestation include: earth to wood contact, foam insulation at foundation in contact with soil, faulty grade, improper drainage, firewood against structure(s), insufficient ventilation, moisture, wood debris in crawlspace, wood mulch or ground cover in contact with the structure, tree branches touching structure(s), landscape timbers and wood decay. Should these or other conditions exist, corrective measures should be taken in order to reduce the chances of infestation of wood destroying insects and the need for treatment.
- 5. Neither the inspecting company nor the inspector has had, presently has, or contemplates having any interest in the property inspected.**

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