

ANNUAL PROPERTY DOCUMENTS WORK SHEET

Titleholding congregation name: _____ Date: _____

City: _____ Province or state: _____

This is an annual review to be completed each September by the secretary of the congregation holding title to your Kingdom Hall property. Its purpose is to ensure that the congregation has in its files all necessary ownership documents and that these are current and conform to all applicable legal requirements. The original of the completed work sheet is to be kept on file by the titleholding congregation. A copy should also be promptly provided to each body of elders of congregations sharing use of the property for their congregation's file. A copy should also be forwarded to the Regional Building Committee. A copy of this work sheet should be sent to the branch office **only** when requested or in connection with a completed *Kingdom Hall Loan Application* (S-84). See page 6 for a list of the document folders that should be part of a titleholding congregation's property document file:

ANSWERING QUESTIONS: Check "Yes," "No," "N/A" (Not Applicable), or write the answer in the "Comments" section. *If you answer "No" to any of the questions or encounter any unexplained discrepancies, please follow up promptly to take any necessary corrective action. If you need assistance, please consult with your Regional Building Committee.*

SECTION ONE: *This section is for ALL congregations holding title to Kingdom Hall property.* [Please refer to paragraphs 4-12, 36, 42-47, and 49 in the document *Information Regarding Ownership of Kingdom Halls* (TO-36).

PROPERTY DOCUMENTS	Yes	No	N/A	Comments
Deed				
1. If the Kingdom Hall property is made up of more than one parcel, indicate how many.				
2. On how many separate deeds was the property (or parcels) conveyed to the congregation?				
3. Do you have a copy of the recorded deed(s) that shows the recording date? If not, contact the local register of deeds office to obtain a copy for your file.	<input type="checkbox"/>	<input type="checkbox"/>		
4. Write the name of the titleholder as listed on each deed, e.g., "Central Congregation of Jehovah's Witnesses, Patterson, New York, Inc." or "[trustees' names] as trustees for the South Congregation of Jehovah's Witnesses, Patterson, New York." The titleholder should generally be shown the same way in all other property documents unless (1) the corporation's name has since changed or (2) the congregation's name has changed (Trustee arrangement only).				
5. Is the titleholder's name on the deed(s) the same as (a) the titleholding corporation's legal name or (b) the congregation's current trustees and its current name? If not, explain why they differ, e.g., "The corporation changed its name;" "The original trustees have been replaced."	<input type="checkbox"/>	<input type="checkbox"/>		
6. Is the congregation the sole owner of the property so that no one else is shown on the deed to have any interest in the property? If not, list any other owners.	<input type="checkbox"/>	<input type="checkbox"/>		
7. Have you confirmed that the legal description of the property on the deed(s) is correct? The legal description should be identical in all other property documents.	<input type="checkbox"/>	<input type="checkbox"/>		

PROPERTY DOCUMENTS	Yes	No	N/A	Comments
Title Insurance Policy/Attorney's Title Opinion				
8. If you have an Owner's Policy of Title Insurance or an Attorney's Title Opinion, answer questions 9-12 (skip question 13). If not, it is generally unnecessary to obtain one after a property has been acquired (see also paragraph 7 of the TO-36 form); skip to question 13.				
9. Is the owner's name on the policy or opinion the same as the titleholder listed on the deed(s) (see question 4)? If not, write the owner's name.	<input type="checkbox"/>	<input type="checkbox"/>		
10. Does the owner's name on the policy or opinion match (a) the titleholding corporation's legal name or (b) the congregation's current name and its current trustees' names? If not, explain why they differ, e.g., "The corporation changed its name;" "The original trustees have been replaced."	<input type="checkbox"/>	<input type="checkbox"/>		
11. Does the legal description of the property match the legal description on the corresponding deed (see question 7)?	<input type="checkbox"/>	<input type="checkbox"/>		
12. If the policy or opinion lists any encumbrances (e.g., mortgage, deed of trust, lien, easement, restriction, or covenant), have they all been cleared? If not, document them in questions 14 and 15.				
13. If you have a report of a comprehensive record search on the Kingdom Hall property done by a title company or attorney that would show any open mortgages, liens, easements, or other encumbrances on your property, continue on to question 14. If not, you should obtain such a report before answering questions 14-17. (Note: Once you obtain this report, there is no need to obtain another one unless you are applying for a Kingdom Hall loan or your report is over ten years old.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Encumbrances/Use and Access				
14. Is the property clear of any mortgage or deed of trust? If not, list the holder of the mortgage or deed of trust.	<input type="checkbox"/>	<input type="checkbox"/>		
15. Is the property clear of any covenants, easements, restrictions, license agreements, or rights-of-way for utilities, shared driveways, parking lots, or other areas of the property? If not, explain the encumbrance.	<input type="checkbox"/>	<input type="checkbox"/>		
16. If there is an encumbrance on the property, are you able to use the Kingdom Hall and/or parking lot without interference?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17. If private property is crossed to get to the Kingdom Hall, do you have a recorded easement granting you the right to cross the property?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Property Taxes				
18. Is all your property exempt from real property taxes? If not and exemption is available, refer to paragraph 43 in the TO-36 form. If exemption is not available, then write the reason that an exemption is not available.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19. If the answer to question 18 is "Yes," do you have recent proof of exemption (e.g., letter, tax bill, statement, print-out from assessor's Web site)? If not, please request it from your local tax assessor's office.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PROPERTY DOCUMENTS	Yes	No	N/A	Comments
20. If the answer to question 19 is “Yes,” is the owner’s name on the proof of exemption the same as the titleholder (see question 4)? If not, explain why they differ.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21. If you have obtained property tax exemption, are you required to renew the exemption periodically (e.g., annually, biennially)? If you do not know, ask the local tax assessor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22. If the answer to question 21 is “Yes,” have you renewed the exemption on a timely basis?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23. If exemption is not available or your property does not yet qualify for exemption, have you paid all applicable taxes and assessments on a timely basis?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24. Whether or not your property is exempt, have you verified that there are no taxes, assessments, or penalties past due or otherwise due and owing? See paragraph 43 of the TO-36 form. If nothing is owed, document how you obtained this information.	<input type="checkbox"/>	<input type="checkbox"/>		
25. Has the branch office been notified of any acquisition or disposal of real estate owned by the congregation within the past year? Use the <i>Property Description Form</i> (TO-50) available on the jw.org Web site to submit any updates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26. Has the branch office been notified within the past year of significant adjustments in the replacement cost of any congregation-owned buildings or structures, such as Kingdom Halls, apartments, or storage buildings? Any replacement values older than four years should be updated. Check with your Regional Building Committee for assistance in submitting or filling out the <i>Property Description Form</i> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION TWO: This section is for use only by those congregations holding title by means of a corporation. [Please refer to paragraphs 13-23 in the document *Information Regarding Ownership of Kingdom Halls* (TO-36).]

CORPORATE DOCUMENTS	Yes	No	N/A	Comments
1. Do you have a certified copy of the originally filed Articles of Incorporation (or equivalent)?	<input type="checkbox"/>	<input type="checkbox"/>		
2. If the answer to question 1 is "Yes," do the Articles contain the recommended dissolution clause (see paragraphs 18-19 of the TO-36 form)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. If your Articles have been amended or restated, do you have a certified copy of each amendment or restatement filed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. What is your corporation's current legal name (e.g., "Central Congregation of Jehovah's Witnesses, Patterson, New York, Inc.")? This should be either the name shown in the original Articles of Incorporation or, if it was legally changed, the name shown in the applicable amendment.				
5. Do you have your original Bylaws?	<input type="checkbox"/>	<input type="checkbox"/>		
6. If your Bylaws have been amended, do you have the amended version?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Is the corporation's legal name shown correctly on the Bylaws (see question 4)? If not, indicate the name shown.	<input type="checkbox"/>	<input type="checkbox"/>		
8. Is the titleholding congregation's full name correctly shown in the section of the Bylaws defining the corporation's members (e.g., "Central Congregation of Jehovah's Witnesses, Patterson, New York")? If not, indicate the name shown.	<input type="checkbox"/>	<input type="checkbox"/>		
9. Do you have minutes of the latest annual meeting of corporation members that show the election of the corporation's current directors (known as "trustees" in some states)?	<input type="checkbox"/>	<input type="checkbox"/>		
10. List the names of the last elected directors.				
11. Do you have minutes of the latest annual meeting of the Board of Directors (or "Trustees"), following the annual meeting of the members, that show the election of the corporation's current officers?	<input type="checkbox"/>	<input type="checkbox"/>		
12. List the offices and names of the last elected officers (e.g., "President: [full name]").				
13. Are your current directors and officers the same as the ones elected at the last annual meetings of the members and the Board of Directors? (If not, indicate who was replaced by whom.)	<input type="checkbox"/>	<input type="checkbox"/>		
14. Are all current directors and officers living members of the titleholding congregation and qualified to continue serving as directors and officers? (If not, indicate who should be replaced.)	<input type="checkbox"/>	<input type="checkbox"/>		

CORPORATE DOCUMENTS	Yes	No	N/A	Comments
15. If you are required to file a periodic corporation statement (usually with the Secretary of State), have you done so?	<input type="checkbox"/>	<input type="checkbox"/>		
16. Have you verified with the Secretary of State's office or with the County Clerk that your corporation is in good standing and continues to exist?	<input type="checkbox"/>	<input type="checkbox"/>		

Please note that documents involving corporation directors/officers are to be kept current.

SECTION THREE: This section is for use only by those congregations holding title by means of a trustee arrangement. [Please refer to paragraphs 24-31 in the document *Information Regarding Ownership of Kingdom Halls (TO-36).*]

TRUSTEE DOCUMENTS	Yes	No	N/A	Comments
1. Do you have a Certificate of Appointment of Trustees for your originally appointed Trustees?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Do you have a Declaration of Trust for Trustees for your originally appointed Trustees currently serving?	<input type="checkbox"/>	<input type="checkbox"/>		
3. What are the names of your originally appointed Trustees? These should be the names listed on the deed when the property was first acquired.				
4. If you have replaced any of your originally appointed Trustees, do you have a Certificate of Appointment of Substitute Trustee for each Substitute Trustee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. If you have replaced any of your originally appointed Trustees, do you have a Declaration of Trust for Substitute Trustee for each Substitute Trustee currently serving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. If you have replaced any of your originally appointed Trustees, what are the names of your current Trustees and/or Substitute Trustees?				
7. Are all current Trustees and Substitute Trustees living members of the titleholding congregation and qualified to continue serving as such? (If not, indicate who should be replaced.)	<input type="checkbox"/>	<input type="checkbox"/>		
8. If you have replaced any of your originally appointed Trustees, does each Certificate of Appointment of Substitute Trustee include the name of the Trustee being replaced and the name of the Substitute Trustee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9. Do the Certificates of Appointment of Trustees for the originally appointed Trustees and the Certificates of Appointment for all Trustees currently serving contain the exact legal description of the property as shown on the deed(s)?	<input type="checkbox"/>	<input type="checkbox"/>		

Please note that documents involving trustees are to be kept current.

SECTION FOUR: This section is for use only by congregations that are holding title to Kingdom Hall property AND submitting a Kingdom Hall Loan Application (S-84). [Please refer to paragraph 24 in the instructions for the S-84 form.]

ADDITIONAL DOCUMENTS	Yes	No	N/A	Comments
Property Not Yet Purchased				
1. Do you have a proposed deed?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Do you have either a Commitment for an Owner's Title Insurance Policy or a Preliminary Attorney's Title Opinion?	<input type="checkbox"/>	<input type="checkbox"/>		
Property Already Owned by the Congregation				
3. Do you have a current lien search (a current report of a comprehensive record search on the Kingdom Hall property done by a title company or attorney that would show any open mortgages, liens, easements, or other encumbrances on your property)? If your existing Title Insurance Policy, Attorney's Title Opinion, or lien search is less than two years old, a new lien search is not needed.	<input type="checkbox"/>	<input type="checkbox"/>		

Date completed: _____

(Secretary of titleholding congregation—Sign and print name)

The secretary of the titleholding congregation is to consider the results of this review with the coordinator of the body of elders of the titleholding congregation. If corrective action needs to be taken, such should be done promptly. The coordinator of the body of elders is to provide a copy of this signed and completed form to the body of elders of each congregation sharing use of the Kingdom Hall property and to the titleholding congregation's assigned Regional Building Committee with a brief explanation of the corrective action(s) being taken.

(Coordinator of the body of elders of the titleholding congregation—Sign and print name)

Document folders that should be part of a titleholding congregation's property document file:

- *Annual Property Documents Work Sheets* (S-111)
- Correspondence
- Property Deeds—Active (For all currently owned parcels)
- Property Deeds—Inactive (For parcels conveyed to another party)
- Title Work (Title Policy, Title Reports, Title Opinions, lien searches)
- Encumbrance Documents (Mortgages, mortgage satisfactions, easements)
- Property Tax (Copies of property tax exemption applications, letters granting exemption, printouts from assessor Web site, copies of tax bills)

Additional folders needed by congregations holding title by corporation

- Articles of Incorporation (And all amendments)
- Bylaws (Originals and any amendments or replacements)
- Meeting Minutes (For corporation member and directors' meetings)

Additional folders needed by congregations holding title by means of trustees

- Trustee Documents—Active (Certificates of Appointment and Declarations of Trust for each currently serving trustee)
- Trustee Documents—Inactive (Certificates of Appointment and Declarations of Trust for prior trustees)

Links to Web sites that may contain copies of deeds, tax records, and other pertinent records can be located by using the "Find free public records by city and state" search feature at: <http://publicrecords.onlinesearches.com>

Links to Secretary of State Web sites for information concerning many congregations' corporations may be located by using the "Entity Search" feature for your state at: www.e-secretaryofstate.com