



# Pacific Oak Foreclosure Services

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## Information to Start a Foreclosure | Request to Prepare a Notice of Default for HOA Delinquent Assessment

**IMPORTANT: If completing digitally, please complete form then Save To File and/or Print form before closing, or your information will be lost. You may also Print the blank form and complete manually.**

DATE (mm/dd/yy): \_\_\_\_/\_\_\_\_/\_\_\_\_

I/We hereby instruct Pacific Oak Foreclosure Services, Inc. (POFS), as Substituted Trustee/Agent to initiate foreclosure on the owner of real property described below for delinquent payments owed to the homeowners association (Client).

Name of Property Homeowner: \_\_\_\_\_

Street Address of Property: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Property Parcel Number (APN): \_\_\_\_\_

Account Number: \_\_\_\_\_

### The following documents are provided, as they apply:

- Accounting Ledger/Statement of total amount owed to date in regular assessments, special assessments, late fees, interest, costs of collection and any other charges
- Letter(s) sent to property owner requesting payment of delinquent HOA payments
- Notice of Intent to Lien, sent to property owner
- Recorded Notice of Delinquent Assessment
- Notice of Board Action to Commence Foreclosure on the Lien
- Original signed/notarized Substitution of Trustee
- Other (describe) \_\_\_\_\_

Date of Default (Date of first missed payment): \_\_\_\_\_

Partial payment has been accepted since default occurred:  Yes  No

Date last payment made: \_\_\_\_/\_\_\_\_/\_\_\_\_ For: \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Unpaid Regular Assessments for the period \_\_\_\_/\_\_\_\_/\_\_\_\_ through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Unpaid Special Assessments for the period \_\_\_\_/\_\_\_\_/\_\_\_\_ through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Unpaid Late Charges for the period \_\_\_\_/\_\_\_\_/\_\_\_\_ through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Legal Fees through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Collection Costs through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Other charges (describe): \_\_\_\_\_ through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ Interest due through\* \_\_\_\_/\_\_\_\_/\_\_\_\_

\$ \_\_\_\_\_ **TOTAL**

(\*Use date of this signed form)

The amounts due to the Client shall increase by:

- Regular assessments of \$ \_\_\_\_\_ due on \_\_\_\_ day of each:  Month  Quarter  Semi-Annually  Annually
- Late charge of \$ \_\_\_\_\_ due \_\_\_\_ days after date the assessment is due
- Interest shall also be assessed at the rate of \_\_\_\_\_ % fixed per year (annum) OR \_\_\_\_\_ variable

*Client shall advise Pacific Oak Foreclosure Services, Inc. of any changes in assessments and/or of any additional charges that shall become due.*

**Subject Property is:**  Improved  Vacant  Unimproved

**Property Type:**

- Commercial  Condo  Duplex  In Construction  Industrial
- Mobile Home  Multi-Unit  1-4 unit Residential  Vacant Land

Property is currently Owner Occupied as their Primary Residence .....  Yes  No  Do Not Know

Property is occupied as a 2nd (or vacation) home .....  Yes  No  Do Not Know

Property is currently occupied by a Tenant as their residence \* .....  Yes  No  Do Not Know

Some structure(s) on the property is/are used as a residence .....  Yes  No  Do Not Know

There is a mobile home or manufactured home on the property .....  Yes  No  Do Not Know

Property is occupied for a business .....  Yes  No  Do Not Know

To my knowledge, the current property owner is serving in the military service .....  Yes  No  Do Not Know

Property has been in foreclosure before: . . .  Yes (Recording date(s) \_\_\_\_/\_\_\_\_/\_\_\_\_ , \_\_\_\_/\_\_\_\_/\_\_\_\_)  No

There are open bankruptcy proceedings, restraining orders, or legal actions involving this property owner or affecting this property:  
 Yes  No  Do not know

*Client will notify Pacific Oak Foreclosure Services, Inc. about any new legal activity they become aware of.*

**\* Tenant Address:** If Tenants are currently occupying the property:

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

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Mailing address(es) of current property owner/ Borrower/Trustor(s) if different than property address:**

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

Address: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

*Client will notify Pacific Oak Foreclosure Services, Inc. of any change in address.*

**Name of Homeowners' Association (Client):**

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

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Name of Management Company for HOA (Client):**

Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

**Authorized HOA Representative who will sign foreclosure documents:**

Name: \_\_\_\_\_ Title (pertaining to the HOA): \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

**Primary contact for this foreclosure:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Business: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

**Other parties to receive correspondence/mailings pertaining to this foreclosure:**

Name: _____	Name: _____
Address: _____	Address: _____
City: _____	City: _____
State: _____ Zip: _____	State: _____ Zip: _____
Phone (main): _____	Phone (main): _____
Phone (fax/other): _____	Phone (fax/other): _____
Email: _____	Email: _____

*Authorized preparer of this form:*

Name: \_\_\_\_\_  
Title: \_\_\_\_\_

Signature: \_\_\_\_\_

By providing my initials below, I agree that the above information is correct and complete to my knowledge, that all required notification provisions as may be applicable to this loan have been complied with, and that Pacific Oak Foreclosure Services, Inc. may initiate foreclosure proceedings on behalf of the homeowners association.

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**Please return completed form to Pacific Oak Foreclosure Services, Inc. by email, fax or mail.  
If mailing with original documents, please send by certified first class mail or overnight service.**