

# Pacific Oak Foreclosure Services

INC.

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## Foreclosure Information Sheet - Required to Start a Foreclosure

DATE: \_\_\_\_\_

Name & signature of preparer of this form: \_\_\_\_\_

We hereby instruct, **Pacific Oak Foreclosure Services, Inc.**, as Substituted Trustee/Agent for Beneficiary to initiate foreclosure on the Deed of Trust and Promissory Note executed

by: \_\_\_\_\_  
Name(s) of Borrower /Trustor

1. Property Address: \_\_\_\_\_ County \_\_\_\_\_

2. APN(s): \_\_\_\_\_

3. Enclosed are copies of the following documents:

\_\_\_\_\_ Note\*\*      \_\_\_\_\_ Note Modification Agreements\*\*      \_\_\_\_\_ Extensions\*\*  
\_\_\_\_\_ Deed of Trust\*\*      \_\_\_\_\_ Assignment(s) of Deed of Trust \*\*  
\_\_\_\_\_ Balloon Payment Notice or other required Notice  
\_\_\_\_\_ Payment/Transaction History to DATE  
\_\_\_\_\_ Power of Attorney  
\_\_\_\_\_ Other

\*\* We require you to provide us with the **originals** of these documents prior to sale date.

4. Is this loan a 1<sup>st</sup> Deed of Trust? \_\_\_ Yes \_\_\_ No

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

Maturity Date of Note: \_\_\_\_\_

5. Balloon payment: \_\_\_ Yes \_\_\_ No Balloon Due date: \_\_\_\_\_

If Balloon Due, was owner given 90-150 day notice? \_\_\_ Yes \_\_\_ No Date notice given? \_\_\_\_\_

Other Notice required? \_\_\_ Yes \_\_\_ No What? \_\_\_\_\_ Date notice given? \_\_\_\_\_

6. Original Loan Amount: \$ \_\_\_\_\_ Unpaid Principal Balance of Loan: \$ \_\_\_\_\_

Monthly Payment: \$ \_\_\_\_\_ Date last payment made: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

For: Mo. \_\_\_\_\_ Day \_\_\_\_\_ Yr \_\_\_\_\_

Amount required to reinstate or pay off the loan as of the DATE given at top of form is: \_\_\_\_\_

7. Interest has been paid to: (Date): \_\_\_\_\_

Interest due at DATE, at top of form is: \$ \_\_\_\_\_

Interest is figured at: \_\_\_\_\_ % fixed per annum, OR \_\_\_\_\_ variable

Interest due per day \$ \_\_\_\_\_ OR Interest due per month \$ \_\_\_\_\_

Interest Days per Year: \_\_\_365 OR \_\_\_360 (Choose one)

Interest Accrual Days per Year: \_\_\_365 OR \_\_\_360 (Choose one)

8. The evidence of the loan calls for the payment of late charges: \_\_\_ Yes \_\_\_ No

If YES, the Late Fee is charged \_\_\_ Monthly, OR \_\_\_ Quarterly \_\_\_

Late Fee is: \$ \_\_\_\_\_ OR \_\_\_\_\_ % of Principal

Late Fee is charged if Trustor does not make payment within \_\_\_\_\_ days of due date

Accumulated Late Fees (from date) \_\_\_\_\_ to (Date given at top of form) \_\_\_\_\_ are \$ \_\_\_\_\_

**(Note: Late fees cannot be charged after Note Maturity Date)**

9. Date of Default (Default became effective as of this date): \_\_\_\_\_

10. Have you accepted partial payment on any installment due since default occurred? \_\_\_Yes \_\_\_No

11. Default exists because of the following reason(s):

\_\_\_Late Payments: Installment of principal and interest\_\_\_, OR interest only\_\_\_ which became due on \_\_\_\_\_ and all subsequent installments; OR

\_\_\_Mature Loan: The balance of the principal sum which became due by maturity of the note on \_\_\_\_\_ together with interest from \_\_\_\_\_

\_\_\_Delinquencies due on a prior (senior) Encumbrance / Real Estate Taxes / Fire Insurance (circle which)

\_\_\_Other (describe) \_\_\_\_\_

12. Have delinquencies occurred on the following? If YES, and monies have been advanced, please show the amounts and the date of said advance(s) and attach receipts evidencing the advance. If YES and no monies have been advanced, indicate 'NONE.'

\_\_\_Yes \_\_\_No Senior Deed of Trust? Date: \_\_\_\_\_ Amount of Advance \$ \_\_\_\_\_

\_\_\_Yes \_\_\_No Real Estate Taxes? Date: \_\_\_\_\_ Amount of Advance \$ \_\_\_\_\_

\_\_\_Yes \_\_\_No Fire/other Insurance DOT requires? Date: \_\_\_\_\_ Amount of Advance \$ \_\_\_\_\_

\_\_\_Yes \_\_\_No Other? Date: \_\_\_\_\_ Amount of Advance \$ \_\_\_\_\_

13. Are you using a loan servicing company to collect payments? \_\_\_Yes \_\_\_No

**(If YES, inform that agency NOT TO accept payments during the foreclosure process)**

14. Has property been foreclosed on before? \_\_\_Yes \_\_\_No; If YES, recording date of prior NOD: \_\_\_\_\_

15. Are you aware of any Bankruptcy proceedings, restraining orders, or legal actions currently involving this property? \_\_\_Yes \_\_\_No

16. Was the loan principally negotiated in Spanish or any other foreign language? \_\_\_Yes \_\_\_No

17. Name and current (or last known) address, of original Trustor/Borrower shown in Deed of Trust:

\_\_\_\_\_

18. The name and all known current addresses of the present property owner/record holder (if different from the original Trustor/Borrower):

\_\_\_\_\_

\_\_\_\_\_

19. Any additional address(es) you have for present property owner(s):

\_\_\_\_\_

\_\_\_\_\_

20. Is billing address of present property owner different from property address? \_\_\_Yes \_\_\_No

If YES, billing address is: \_\_\_\_\_

21. Property is: Improved\_\_\_ Vacant\_\_\_ Unimproved\_\_\_

22. Property Type is: Commercial\_\_\_ Condo\_\_\_ Duplex\_\_\_ Industrial\_\_\_ Mobile Home\_\_\_  
Multi-Unit\_\_\_ Residential\_\_\_ Vacant Land\_\_\_ In Construction\_\_\_

23. Is this a Residential loan occupied by the Borrower as principal residence at time loan became delinquent?

\_\_\_Yes \_\_\_No

24. Is property currently Owner Occupied as their Primary Residence? \_\_\_Yes \_\_\_No

25. Is property occupied as a 2<sup>nd</sup> home or vacation home? \_\_\_Yes \_\_\_No

26. Is property currently occupied by a Tenant as their residence? \* \_\_\_Yes \_\_\_No

27. Is any structure on the property used as a residence? \_\_\_Yes \_\_\_No

28. Is there a mobile home or manufactured home on the property? \_\_\_Yes \_\_\_No

29. Is property occupied for a business? \_\_\_Yes \_\_\_No

30. Is the present property owner, to your knowledge, currently in the military service? \_\_\_Yes \_\_\_No

31. Name of Original Beneficiary (Beneficiary Statement) as it will appear on the Notice of Default:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

32. All Current Beneficiary Names, Titles, Addresses, Phone Numbers, Fax Numbers and Email Addresses:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

33. Full Name(s) and Title(s) of individuals signing foreclosure documents for this file  
(If different from names given in # 32, above):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

34. May we use Email as the primary method of correspondence? \_\_\_Yes \_\_\_No  
Email address(es) of document signer(s)

\_\_\_\_\_

35. Name of Client / Lending Organization: \_\_\_\_\_

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

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

Phone #: \_\_\_\_\_ Fax #: \_\_\_\_\_ Email: \_\_\_\_\_

36. Additional parties to receive correspondence/mailings pertaining to this foreclosure:  
(Name(s) email address(es) or mailing address(es), phone #s and fax #s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

37. Additional information:

\* Note: If there are tenants living at the property include their names and mailing address(es) here:

\_\_\_\_\_  
\_\_\_\_\_