

# TAX RECORD INFORMATION SHEET

**THIS FORM MUST BE COMPLETED AND SIGNED BY TITLE OFFICER,  
ESCROW OFFICER AND/OR CLOSING ATTORNEY.**

**THIS SHEET MUST BE COMPLETELY FILLED OUT OR IT WILL BE RETURNED FOR COMPLETION.**

**INSTRUCTIONS FOR COMPLETION OF TAX RECORDS:**

1. Tax legal description must be exactly as shown on tax records.
2. Show taxing authority  only where we are escrowing for payment  even if we are not escrowing for payment.
3. Tax bills & information are obtained from this sheet. Therefore, it must be completed in full. Include any Assessments, Municipal Utility District Charges, Ground Rents, etc. that are escrowed for payment. Indicate estimated taxes if applicable. Attach copies of paid tax certificates and tax receipts.

The following information is certified by: SETTLEMENT INC.

DATE LOAN CLOSED: \_\_\_\_\_

TITLE/ESCROW/CLOSING ATTORNEY \_\_\_\_\_

REFINANCE  YES  NO

LOAN # 388765436

BORROWER(S) NAME: JASON SAMPLE, LINDSEY SAMPLE

TAXES FOR CURRENT YEAR LISTED IN NAME OF: \_\_\_\_\_

PROPERTY ADDRESS: 123 MAIN STREET, SOMEWHERE, CALIFORNIA 90000

**CURRENT TAX ASSESSMENT BASED ON:**

ACREAGE  VACANT  PARTIAL CONSTRUCTION  COMPLETE CONSTRUCTION

**LEGAL DESCRIPTION:**

SECTION \_\_\_\_\_ BLOCK \_\_\_\_\_ LOT(S) \_\_\_\_\_ TRACT \_\_\_\_\_

MAP \_\_\_\_\_ UNIT # \_\_\_\_\_ TWNSHP \_\_\_\_\_ RANGE \_\_\_\_\_

SUBDIVISION \_\_\_\_\_

METES & BOUNDS  YES  NO

TYPE OF TAX \_\_\_\_\_ LAST AMOUNT PAID \_\_\_\_\_

CURRENT TAXES PAID THRU DATE \_\_\_\_\_ NEXT DUE DATE \_\_\_\_\_

NEXT AMOUNT DUE \_\_\_\_\_ THIS AMOUNT IS  ESTIMATE  ACTUAL

**PAYMENT FREQUENCY:**

ANNUAL  SEMI-ANNUAL  QUARTERLY  TRI-ANNUAL  OTHER: \_\_\_\_\_

TAXING AUTHORITY NAME & ADDRESS: \_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_

\_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_

\_\_\_\_\_

TYPE OF TAX \_\_\_\_\_ LAST AMOUNT PAID \_\_\_\_\_

CURRENT TAXES PAID THRU DATE \_\_\_\_\_ NEXT DUE DATE \_\_\_\_\_

NEXT AMOUNT DUE \_\_\_\_\_ THIS AMOUNT IS  ESTIMATE  ACTUAL

**PAYMENT FREQUENCY:**

ANNUAL  SEMI-ANNUAL  QUARTERLY  TRI-ANNUAL  OTHER: \_\_\_\_\_

TAXING AUTHORITY NAME & ADDRESS: \_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_

\_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_

\_\_\_\_\_

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TYPE OF TAX \_\_\_\_\_  
CURRENT TAXES PAID THRU DATE \_\_\_\_\_  
NEXT AMOUNT DUE \_\_\_\_\_

LAST AMOUNT PAID \_\_\_\_\_  
NEXT DUE DATE \_\_\_\_\_  
THIS AMOUNT IS [ ] ESTIMATE [ ] ACTUAL

**PAYMENT FREQUENCY:**  
[ ] ANNUAL [ ] SEMI-ANNUAL [ ] QUARTERLY [ ] TRI-ANNUAL [ ] OTHER: \_\_\_\_\_

**TAXING AUTHORITY NAME & ADDRESS:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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TYPE OF TAX \_\_\_\_\_  
CURRENT TAXES PAID THRU DATE \_\_\_\_\_  
NEXT AMOUNT DUE \_\_\_\_\_

LAST AMOUNT PAID \_\_\_\_\_  
NEXT DUE DATE \_\_\_\_\_  
THIS AMOUNT IS [ ] ESTIMATE [ ] ACTUAL

**PAYMENT FREQUENCY:**  
[ ] ANNUAL [ ] SEMI-ANNUAL [ ] QUARTERLY [ ] TRI-ANNUAL [ ] OTHER: \_\_\_\_\_

**TAXING AUTHORITY NAME & ADDRESS:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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TYPE OF TAX \_\_\_\_\_  
CURRENT TAXES PAID THRU DATE \_\_\_\_\_  
NEXT AMOUNT DUE \_\_\_\_\_

LAST AMOUNT PAID \_\_\_\_\_  
NEXT DUE DATE \_\_\_\_\_  
THIS AMOUNT IS [ ] ESTIMATE [ ] ACTUAL

**PAYMENT FREQUENCY:**  
[ ] ANNUAL [ ] SEMI-ANNUAL [ ] QUARTERLY [ ] TRI-ANNUAL [ ] OTHER: \_\_\_\_\_

**TAXING AUTHORITY NAME & ADDRESS:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PARCEL/PROPERTY ID/TMS# \_\_\_\_\_  
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