

Form: Foreclosure information form and case template

**PREVIEW**  
FORECLOSURE INFORMATION FORM

Date \_\_\_\_\_

Legal Description of Property \_\_\_\_\_

Property Street Address \_\_\_\_\_

Name of Present Owners \_\_\_\_\_

Mailing Address of Present Owners \_\_\_\_\_

Name of Previous Owners \_\_\_\_\_

Mailing Address of Previous Owners \_\_\_\_\_

Name of Junior Lienholders, if any \_\_\_\_\_

Mailing Address of Junior Lienholders, if any \_\_\_\_\_

Name of any other Parties, with the exception of the Debtors, to whom a notice of foreclosure should be sent (any and all debtors and guarantors that you are aware of) \_\_\_\_\_

Mailing Address of any other Parties, with the exception of the Debtors, to whom a notice of foreclosure should be sent (any and all debtors and guarantors that you are aware of) \_\_\_\_\_

Name of Original Mortgagee \_\_\_\_\_

Mailing Address of Original Mortgagee \_\_\_\_\_

Name of Present Note Owner \_\_\_\_\_

Address of Present Note Owner \_\_\_\_\_

Date of the Note \_\_\_\_\_

Original Principal \$ \_\_\_\_\_

Amount advanced on the Note \$ \_\_\_\_\_

Interest Rate on the Note \_\_\_\_\_%

Date Monthly Payments Commence \_\_\_\_\_

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Amount of Monthly Payment \$ \_\_\_\_\_

Date due for each subsequent Payment \_\_\_\_\_

Date last Payment was made \_\_\_\_\_

Date of Default \_\_\_\_\_

Number of Payments in Default from \_\_\_\_\_ [Date] through \_\_\_\_\_ [Date]

Unpaid Principal Balance of the Note as of the date Default occurred \$ \_\_\_\_\_

Amount of Principal and Interest currently owed \$ \_\_\_\_\_

Amount for Escrow and Taxes \$ \_\_\_\_\_

Total Monthly Payment \$ \_\_\_\_\_

Late Charge per Month \$ \_\_\_\_\_

Reinstatement Fee \$ \_\_\_\_\_

Attorney's Fee \$ \_\_\_\_\_

Recording Data \_\_\_\_\_

Film Code or Volume and Page Number \_\_\_\_\_

FHA Loan (indicate reference numbers) \_\_\_\_\_

VA Loan (indicate reference numbers) \_\_\_\_\_

Private Mortgage Insurance. If applicable, name and address of entity \_\_\_\_\_

Summarize list of contacts made with the Debtor to provide Notice of Default and cure the Default  
\_\_\_\_\_

Reason Loan Is in Default, i.e., loss of job \_\_\_\_\_

Has Debtor filed bankruptcy? Yes \_\_\_\_\_ No \_\_\_\_\_ If so, list: \_\_\_\_\_

Date debtor filed bankruptcy \_\_\_\_\_

Court in which the bankruptcy is pending \_\_\_\_\_

Bankruptcy case number \_\_\_\_\_

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Name, address and phone number of attorney representing the debtor \_\_\_\_\_

Type of bankruptcy \_\_\_\_\_

Tax Liens Date \_\_\_\_\_ Amount \$ \_\_\_\_\_ Type of Tax \_\_\_\_\_

Name of Government Entity \_\_\_\_\_

Internal Revenue Service Tax Liens: Date \_\_\_\_\_ Amount \$ \_\_\_\_\_

Type of Tax (e.g., 1040) \_\_\_\_\_

Other:

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DATE  
DUE

DATE  
COMP

Item

\_\_\_\_\_

1. Complete Attorney Fee Agreement

\_\_\_\_\_

2. Letter to Client regarding Foreclosure

\_\_\_\_\_

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3. Complete title search for correct Legal Descriptions, Liens and Identification of State or Federal Tax Liens

\_\_\_\_\_

4. Send Debtor Demand Letter 10 DAYS BEFORE YOU ACCELERATE LOAN

\_\_\_\_\_

5. Prepare Request of Trustee To Act or Resignation of Trustee and Appointment of Substitute Trustee

# THANK YOU

\_\_\_\_\_

6. Complete Affidavit of Note Holder

\_\_\_\_\_

7. Record and file the Appointment of Substitute Trustee

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8. Send  
letter to court regarding value of property

9. Give  
21 days' written notice before foreclosure. If  
the property is a Homestead, then send a 20-  
day notice of acceleration. If there is an  
Internal Revenue Service lien on the property  
then also send the IRS a 25-day written notice  
before foreclosure

\_\_\_\_\_  
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10. Do  
Notice of Foreclosure Sale or Notice of  
Substitute Trustee Sale. The notice must state  
where the sale will occur and the earliest and  
latest time that the sale will occur--within  
three hours from the start time stated in the  
notice

\_\_\_\_\_  
11. Affidavit of Service

\_\_\_\_\_  
12. Affidavit of Filing and Posting

\_\_\_\_\_  
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13. Post  
Notice of Foreclosure at the courthouse

\_\_\_\_\_  
14. Request for Constable to do posting  
Yes \_\_\_\_\_ No \_\_\_\_\_

\_\_\_\_\_  
15. Complete Nonmilitary Affidavit

\_\_\_\_\_  
**THANK YOU**

16. File the  
Notice of Substitute or Trustee's Sale with the  
county clerk's office

\_\_\_\_\_  
17. Send  
Notice of Trustee or Substitute Trustee's Sale  
to Debtor

\_\_\_\_\_  
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18. Send  
Notice to taxing entities if necessary

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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19. Work  
Agreement to Reinstatement of the Loan  
based on Client's desire Yes \_\_\_\_\_ No

\_\_\_\_\_  
20.  
Conduct foreclosure sale

\_\_\_\_\_  
21.  
Complete script of  
Trustee's/Substitute Trustee's Sale

\_\_\_\_\_  
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22.  
Complete and file Trustee's/Substitute  
Trustee's Deed

\_\_\_\_\_  
23. Notify  
Debtor that property has been foreclosed on

\_\_\_\_\_  
24. Final  
letter to Client

\_\_\_\_\_  
25. If  
Client desires to avoid foreclosures, consider  
use of Deed in Lieu of Foreclosure

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