

**REQUEST FOR NOTICE OF MELLO-ROOS ASSESSMENT**

(California Civil Code §1102.6b)

**NOTE:** This form is used by a seller's agent when preparing a listing/marketing package or performing a due diligence investigation on a property, to request information from the Improvement District Office about Mello-Roos assessments encumbering the seller's property for disclosing the terms of the bonded indebtedness to a buyer assuming the debt.

**DATE:** \_\_\_\_\_, 20\_\_\_\_\_, at \_\_\_\_\_, California.  
*Items left blank or unchecked are not applicable.*

<b>TO IMPROVEMENT DISTRICT OFFICE:</b>
District Name _____
Address _____
_____
Phone _____

<b>FROM BROKER:</b>
Agent's Name _____
Broker's Name _____
CalBRE#: _____
Address _____
_____
Phone _____ Cell _____
Email _____

You are kindly requested to prepare and forward to Broker identified above a Notice of Assessment regarding real estate referred to as

Property address \_\_\_\_\_

Owner's name \_\_\_\_\_  
containing the following information as the bonded indebtedness encumbering this property:

1. The present principal balance ..... \$ \_\_\_\_\_
2. The annual rate of interest \_\_\_\_\_ %,
  - 2.1  fixed, or  variable.
3. The interest is paid through \_\_\_\_\_, 20\_\_\_\_\_.
4. Annual payments are delinquent for the years \_\_\_\_\_.
5. Total amount of delinquency to bring the Assessment current ..... \$ \_\_\_\_\_
6. The amount of each annual installment ..... \$ \_\_\_\_\_
7. The year of final payment and release of lien ..... \$ \_\_\_\_\_
8. The bond indebtedness  is, or  is not, a blanket lien on the property with other properties.
  - 8.1 If the bond is a blanked lien, a provision for release of the property from the bonded indebtedness  does, or  does not, exist.

Enclosed is the statutory maximum fee of \$10.00 for preparing and forwarding the Notice of Assessment.

Your response is looked forward to within the statutory five-day period after your receipt of this request.

Date: \_\_\_\_\_, 20\_\_\_\_\_

Submitting Agent's Signature: \_\_\_\_\_