

DataTree[®] ACADEMY

OPEN LIEN REPORT

Rev. 20201015



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Overview

The Open Lien Report focuses specifically on the current owner’s open liens, the lien position, last market sale, property tax status and foreclosure status, if any. Additionally, basic property characteristics and owner information, including vesting, are provided. This report is designed to provide the user with a snap shot of the current owner’s lien and property tax exposure.

The various sections are described below.

Before We Begin:

The Open Lien Report sources data from the following: County Recorder, County Assessor, and First American Title Plant data (where available). Coverage information is found in the Help Menu > Geo-Coverage in DataTree.

The Tax Status section will use Title Plant information and switch to Assessor’s information if plant data is unavailable.

Property and Ownership Information:

The top of the report contains the owner and property information. Foreclosure information will also be displayed here. Note that you can order the Foreclosure Report directly through the Open Lien Report.

Example One:

Open Lien Report

1300 Corte De Los Vecinos, Walnut Creek, CA 94598

APN: Contra Costa County Data as of: 08/02/2016

Owner Information 1

Owner Name: Brenda J Miller
 Vesting: Separate Estate / Property
 Mailing Address: 1300 Corte De Los Vecinos, Walnut Creek, CA 94598

Property Details 2

Land Use:	SFR	Lot Size:	2,100 Sq. Ft.	Stories:	2
Garage #:	2	Zoning:	CDP	Living Area:	1,729 Sq. Ft.
Pool:		Parking Type:	Garage/Carport	Year Built / Eff:	1972 / 1973
Fireplace:	1	Subdivision / Tract #:	/ 3753	Bedrooms:	3
Heat / Cooling:	Forced Air / Central	Baths (F / H):	2 / 1	Total Rooms:	8
Price / Sq. Ft.:	\$117				

Example Two, includes foreclosure data:

Open Lien Report

731 Tampico, Walnut Creek, CA 94598

APN: Contra Costa County Data as of: 08/02/2016

Owner Information

Owner Name: Lori S Anderson
 Vesting: Separate Estate / Property
 Mailing Address: 731 Tampico, Walnut Creek, CA 94598

Active Foreclosure Status 3

Status: Default
 Filing Date: 03/09/2016
 Doc Type: Notice Of Default
 Unpaid:
 Auction Date:

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Property Details

Land Use:	SFR	Lot Size:	1,100 Sq. Ft.	Stories:	2
Garage #:	2	Zoning:	PUD	Living Area:	1,508 Sq. Ft.
Pool:		Parking Type:	Built-In Garage	Year Built / Eff:	1974 / 1975
Fireplace:	1	Subdivision / Tract #:	/ 4317	Bedrooms:	3
Heat / Cooling:	Forced Air / Central	Baths (F / H):	2 / 1	Total Rooms:	8
Price / Sq. Ft.:					

Open Liens and Positions:

The current owner's open liens and the lien positions will be shown in the next section. As with other reports, selecting the checkbox next to the report will activate the Order button to order the document.

Open Liens & Position								
Owner 1:		Brenda J Miller						
Owner 2:								
<input type="checkbox"/>	Date	Position / Type	Verified	Amount	Lender	Borrower(s)	Loan Type	Type / Term
<input checked="" type="checkbox"/>	03/27/2007	1st / Trust Deed/Mortgage		\$300,000	World Savings	Miller Brenda J	Conventional	Fix /
<input type="checkbox"/>	08/09/2007	2nd / Trust Deed/Mortgage		\$25,000	World Savings	Miller Brenda J	Conventional	Var /

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Last Market Sale:

The most recent conveyance document will be found in this section. Remember that this is for the current owner only.

Last Market Sale							
<input type="checkbox"/>	Sale Date	Rec Date	Verified	Type	Seller	Buyer	Sale Price
<input type="checkbox"/>	08/22/1989	08/29/1989		Full Value	Kirk, C. / Anthony,	Miller, Brenda	\$202,500

[ORDER](#)

Tax Status:

The tax status section will include information from the First American title plant, if one is available for that county or the local County Assessor’s information. The examples below show the differences between both.

Example One includes a county where a First American Title Plant has coverage. Note the assessment detail breakdown along with the penalty amounts.

Tax Status							
Effective Date:	09/02/2016	Land Value:	\$83,259	Exemption:	\$7,000		
Assessor Parcel#:		Improvement Value:	\$226,702	Total Taxable Value:	\$302,961		
Tax Year:	2015-16			Property Tax:	\$3,952.16		
2015-16 Taxes							
	Tax Type / Basis	Amount	Status	Date Paid	Delinquent After	Penalty	Balance Due
Installment 1	Partial	\$1,976.08	Paid	11/19/2015	12/10/2015	\$197.60	
Installment 2	Partial	\$1,976.08	Paid	04/07/2016	04/11/2016	\$217.60	
Assessment Details							
Description	Type	Amount					
Central Ccco Sanitary Dist	Sewer	\$471.00					
Mt Diablo Mello Roos	Mello Roos	\$67.00					
Mosquito Abatement	Misc Assessments	\$43.72					

Example Two shows county Tax Assessor data in lieu of the First American Title Plant information.

Tax Status							
Effective Date:	01/03/2014	Land Value:	\$61,716	Exemption:			
Assessor Parcel#:		Improvement Value:		Total Taxable Value:			
Tax Year:	2015			Property Tax:	\$2,225.52		
2015 Taxes							
	Tax Type / Basis	Amount	Status	Date Paid	Delinquent After	Penalty	Balance Due
Installment 1	Partial	\$1,112.76					
Installment 2	Partial	\$1,112.76					

Verified Records Feature:

In any report, you may see a green checkmark in the column labeled “Verified”, as shown below. This indicates that the transaction has been found in multiple data sources.

Open Liens & Position

Owner 1: Todd W Bell / Deborah W Bell
 Owner 2: Deborah W Bell

<input type="checkbox"/>	Date	Position / Type	Verified	Amount	Lender	Borrower(s)	Loan Type	Type / Term
<input type="checkbox"/>	05/30/2013	1st / Trust Deed/Mortgage	1 ✓	\$245,000	Wells Fargo BK NA	Bell Todd W / Bell Deborah W	Conventional	/ 15 Years
ORDER								

Last Market Sale

<input type="checkbox"/>	Sale Date	Rec Date	Verified	Type	Seller	Buyer	Sale Price
<input type="checkbox"/>	03/03/2005	03/10/2005	2 ✓	Confirmed	Spencer, Carol E	Bell, Todd W & Deborah W	\$477,000
ORDER							