

TAX WORKSHEET

Supplemental Property Tax Bill

Servicer Contact Sheet

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CLARIFY BILL

Organize a supplemental tax bill before contacting the servicer so you can document whether it is already in escrow, separately payable, or missing from the servicer record.

WHEN TO USE

Organize a supplemental tax bill before contacting the servicer so you can document whether it is already in escrow, separately payable, or missing from the servicer record.

FEDERAL / PRIMARY REFERENCE

12 CFR § 1024.17 · 12 CFR § 1024.36

Federal baseline to check

- ☐ A supplemental or corrected tax bill is not automatically an escrow item just because the regular property tax is escrowed; the loan/account setup and servicer records must be checked.
- ☐ If a servicer knows a charge that will be an escrow item in the next computation year, Regulation X generally requires that known amount to be used in the estimate.
- ☐ A borrower can use an RFI to obtain servicing records or clarify whether the servicer is tracking a particular tax bill.

BORROWER AND LOAN

Borrower name _____	Property address _____
Loan/account number _____	Servicer name _____

Supplemental bill facts

Authority / parcel: _____ Supplemental tax year/type: _____

Notes: _____

Regular bill comparison

Regular bill: \$ _____ Supplemental/corrected bill: \$ _____ Due: _____

Notes: _____

Servicer record

Servicer analysis/ledger lists this bill? Yes / No / Unsure Reference: _____

Notes: _____

Who is expected to pay

Expected payer: Servicer / Borrower / Unsure Expected payment date: _____

Notes: _____

Written clarification

Written servicer answer / case number / follow-up date: _____

Notes: _____

Attachment checklist

- ☐ Supplemental tax bill
- ☐ Regular tax bill
- ☐ Escrow analysis
- ☐ Servicer tax-disbursement history
- ☐ Copy of this completed template retained for your records
- ☐ Mailing / delivery confirmation retained if sent formally

Use notes

- ☐ Do not pay a supplemental bill yourself solely because it is absent from the annual analysis; first determine whether the servicer is already scheduled to pay it to avoid duplicate payment.
- ☐ Record the parcel/account number, tax year, bill type, due date, and whether the taxing authority treats it as separate from the regular bill.
- ☐ Ask the servicer for a written answer identifying whether it will pay the bill, from which account, and on what expected date; preserve the response.
- ☐ Keep a complete copy of the completed template and supporting records; send copies rather than irreplaceable originals when copies are sufficient.

PRIMARY SOURCES TO CHECK

12 CFR § 1024.17 • 12 CFR § 1024.36

Official links: <https://www.consumerfinance.gov/rules-policy/regulations/1024/17/> | <https://www.consumerfinance.gov/rules-policy/regulations/1024/36/>