



Syndicate Subscription Legal Plans

LIS PENDENS (NOTICE OF PENDENCY OF ACTION) **CLIENT INTAKE QUESTIONNAIRE:**

A lis pendens can freeze a property sale or refinance. If one has been recorded against your property, or you need to record one, contact us right away. A court may order the losing party to pay attorney's fees on a motion to remove (expunge) a lis pendens.

CONFIDENTIAL. A lis pendens is a recorded notice that a lawsuit affecting title to, or possession of, specific real property is pending. This form is for (A) a party to a lawsuit who wants to record a lis pendens, and (B) an owner or other person affected by a lis pendens who wants it removed. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

You are:

☐ A. Claimant — I want to record a lis pendens → Parts 1–3

☐ B. Owner / affected party — I want a lis pendens removed → Parts 1, 2 & 4

☐ C. Buyer, lender, or title / escrow party affected → Parts 1, 2, 4 & 5

☐ Full Legal Name / Entity Name: _____

Contact person & title (if entity): _____ Syndicate Plan Member ID: _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — THE PROPERTY

1.1 Property address: _____

City: _____ County: _____ State: _____ Zip: _____

Assessor's Parcel Number (APN): _____

1.2 Owner(s) of record (exactly as on deed): _____

1.3 Property type:

☐ Single-family home

☐ Condo / townhouse

☐ Multi-unit residential

☐ Commercial

☐ Vacant land

☐ Other

1.4 Estimated value: \$ _____ Loans / liens: \$ _____

PART 2 — THE LAWSUIT

A lis pendens is valid only while a lawsuit (or cross-complaint) asserting a real property claim is pending.

2.1 Has a lawsuit or cross-complaint been filed? ☐ Yes ☐ No

Court / County: _____ Case Number: _____

Date filed: _____ Next hearing / trial date: _____



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Party Name	Role (plaintiff, defendant, cross-complainant)	Has a Lawyer? (name)

2.2 Claims asserted in the lawsuit:

- | | |
|--|---|
| ☐ Quiet title | ☐ Specific performance |
| ☐ Partition | ☐ Fraudulent transfer |
| ☐ Constructive / resulting trust | ☐ Easement / access rights |
| ☐ Cancellation of deed / instrument | ☐ Foreclosure of lien |
| ☐ Division of property (divorce) | ☐ Money damages only |
| ☐ Other | |

A claim seeking only money (even if secured by the property) is generally NOT a real property claim and cannot support a lis pendens.

2.3 The claimant is represented by:

- | | |
|---|---|
| ☐ Lawyer of record | ☐ Self-represented (pro per) |
|---|---|

In California, a self-represented party generally may record a lis pendens only if the judge approves it.

PART 3 — CLAIMANTS (RECORDING A LIS PENDENS)

3.1 What interest do you claim in the property (ownership, right to buy, easement, share of title)? _____

3.2 What evidence supports your claim (contracts, deeds, payments, emails, witnesses)? _____

3.3 Is a sale, transfer, or refinance of the property expected soon? ☐ Yes ☐ No

If yes, explain: _____

3.4 Owners of Record & Adverse Parties (all must be served before recording):

Name	Mailing Address	Relationship to Property



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Before recording, the notice generally must be mailed by registered or certified mail to all adverse parties and owners of record, and proof of service must be filed with the court immediately after recording. Errors can void the lis pendens.

3.5 Could you post an undertaking (bond) if the court requires one? ☐ Yes ☐ No

PART 4 — OWNERS / AFFECTED PARTIES (REMOVING A LIS PENDENS)

4.1 Date recorded: _____ Recorder document no.: _____

4.2 How did you learn of it?

☐ Mailed to me

☐ Found on title report

☐ Informed by escrow / lender

☐ Other

4.3 Did you receive the notice by certified mail before it was recorded? ☐ Yes ☐ No

4.4 Why you believe the lis pendens is improper (check all that apply):

☐ No lawsuit was pending when recorded

☐ Lawsuit does not include a real property claim

☐ Claim seeks only money damages

☐ Claimant cannot show the claim is probably valid

☐ Notice was not properly served / proof not filed

☐ Not signed by lawyer or approved by judge

☐ Lawsuit was dismissed

☐ Other

4.5 Impact on You:

Is a sale or refinance delayed or at risk? ☐ Yes ☐ No

Transaction type / buyer or lender: _____ Closing date: _____

Estimated losses caused by the lis pendens: \$ _____

4.6 Have you asked the claimant to withdraw it? ☐ Yes ☐ No

If yes, explain: _____

4.7 Would you consider posting a bond so the property can be sold or refinanced? ☐ Yes ☐ No

PART 5 — BUYERS, LENDERS & ESCROW

5.1 Your role: _____ Escrow / title company: _____

Escrow no. / closing date: _____

5.2 Has the title company refused to insure because of the lis pendens? ☐ Yes ☐ No



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PART 6 — GOALS & DOCUMENTS

6.1 What outcome do you want?

- | | |
|--|---|
| ☐ Record a lis pendens | ☐ Remove (expunge) a lis pendens |
| ☐ Negotiate a withdrawal | ☐ Post / require a bond |
| ☐ Recover attorney's fees / losses | ☐ Close a sale or refinance |
| ☐ Defend or pursue the underlying lawsuit | |

Please provide copies of the following, if available. Check each item you are including.

- | | |
|---|--|
| ☐ Recorded lis pendens | ☐ Complaint / cross-complaint |
| ☐ Proof of service | ☐ Deed / preliminary title report |
| ☐ Purchase or loan documents | ☐ Escrow instructions |
| ☐ Letters with the other party | ☐ Court orders |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my lis pendens matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if entity): _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.