

KoStKo Homes, LLC – Surplus Registry Division

State Addendum – CA

Addendum – CA

CALIFORNIA ADDENDUM (CA)

Notes: Some counties and contexts may impose fee caps, waiting periods, or special disclosures for surplus/excess proceeds recovery. Confirm county-specific rules, require clear written disclosures, and consider notarization where required. If a cap applies, apply the lower of (a) agreed fee, or (b) statutory cap.

KoStKo Homes, LLC – Surplus Registry Division

State Addendum – FL

Addendum – FL

FLORIDA ADDENDUM (FL)

Notes: Heir/estate documentation is common. Include probate documents when applicable.
Provide clear fee disclosure and allow client to self-file if preferred.

KoStKo Homes, LLC – Surplus Registry Division

DocuSign Tab Map & Setup Guide

How to Use

Upload the Agreement PDF to DocuSign, then place tabs according to the table below. Use one checkbox group for fee selection (30/35/40). Ensure client initials are required. Set KoStKo as counter-signer.

Field	Who	Type	Page/Section	Notes
Client Full Name	Client	Text	Agreement – Header	Required
Client Address	Client	Text	Agreement – Header	Required
Client Phone	Client	Text	Agreement – Header	Required
Client Email	Client	Text	Agreement – Header	Required
Fee Selection	Client	Checkbox	Section 4	30% / 35% / 40% (choose one)
Client Initials – Disclosure	Client	Initial	Signature Block	Required
Client Initials – Non-Circumvention	Client	Initial	Signature Block	Required
Client Signature	Client	Signature	Section 11	Required
Client Date	Client	Date Signed	Section 11	Auto-populate if possible
KoStKo Signature	KoStKo	Signature	Section 11	Counter-sign
KoStKo Date	KoStKo	Date Signed	Section 11	Counter-sign date

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State Addendum – FL

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KoStKo Homes, LLC – Surplus Registry Division

State Addendum – TX

Addendum – TX

TEXAS ADDENDUM (TX)

Notes: Surplus records may be parcel-level. Ensure claim package includes proof of identity and interest, and confirm the correct office (often Treasurer/Tax Assessor-Collector or District Clerk depending on sale type).

KoStKo Homes, LLC – Surplus Registry Division

State Addendum – IL

Addendum – IL

ILLINOIS ADDENDUM (IL)

Notes: Public records requests may follow FOIA procedures. Maintain FOIA log, deadlines, and written records of all communications. Heir/estate proof may be required depending on county procedures.

KoStKo Homes, LLC – Surplus Registry Division

State Addendum – TX

Addendum – TX

TEXAS ADDENDUM (TX)

Notes: Surplus records may be parcel-level. Ensure claim package includes proof of identity and interest, and confirm the correct office (often Treasurer/Tax Assessor-Collector or District Clerk depending on sale type).

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KoStKo Homes, LLC – Surplus Registry Division

Client Portal Checklist

Client Portal Checklist – What to Expect

- 1) Intake: Confirm identity + mailing address + preferred contact.
- 2) Eligibility: Confirm surplus exists (or is likely) via official office.
- 3) Authorization: Client signs Disclosure + Recovery Agreement.
- 4) Documentation: ID, proof of ownership/heirship, and any required forms.
- 5) Filing: KoStKo submits claim package and tracks confirmation.
- 6) Follow-up: Respond to office requests; provide updates to client.
- 7) Disbursement: Funds released (to client/escrow as allowed).
- 8) Fee Collection: Per Agreement (preferred from proceeds).
- 9) Closeout: Provide completion summary and archive proof-of-work.

KoStKo Homes, LLC – Surplus Registry Division

Surplus Funds Recovery Agreement

SURPLUS FUNDS RECOVERY AGREEMENT (Contingency Fee – No Recovery, No Fee)

This Surplus Funds Recovery Agreement (“Agreement”) is entered into as of [Date], by and between:

CLIENT

Name: _____

Address: _____

Phone: _____

Email: _____

SERVICE PROVIDER

KoStKo Homes, LLC (Surplus Registry Division)

Email: Komed2@gmail.com

1. Purpose

Client acknowledges surplus, excess proceeds, or overbid funds (“Surplus Funds”) may exist in Client’s name or interest as a result of a prior tax sale, foreclosure, or similar government action.

2. Authorization to Act (Limited Agency)

Client authorizes Service Provider to act as Client’s authorized agent for the limited purpose of identifying Surplus Funds, preparing claim documentation, communicating with county offices, submitting claims, and following up until funds are released or denied. This is not a Power of Attorney unless separately executed.

3. Client Disclosure

Client understands they may pursue recovery independently, Service Provider is not a law firm, no legal advice is provided, and recovery is not guaranteed.

4. Contingency Fee (Select One)

30% 35% 40%

Fee applies to the gross amount of Surplus Funds actually recovered. No recovery = no fee.

5. Payment of Fee

Preferred: Fee paid directly from recovered funds (joint endorsement / escrow / authorized disbursement where permitted).

Alternate: If funds are paid directly to Client, Client shall remit the fee within five (5) business days of receipt.

6. Non-Circumvention

Client agrees not to circumvent Service Provider after receiving notice, identification, or claim preparation assistance related to the identified Surplus Funds during the term of this Agreement. This survives termination.

7. Term & Termination

Agreement remains effective until recovery is completed or the claim is formally denied. Client may terminate in writing before claim work begins. Termination after substantial work does not waive compensation if recovery occurs due to Service Provider's efforts.

8. No Assignment / No Purchase of Funds

Service Provider does not purchase or acquire Surplus Funds. All Surplus Funds remain Client's property until released by the government office.

9. Limitation of Liability

Service Provider is not responsible for denials, delays, or actions outside its control.

10. Governing Law

This Agreement is governed by the laws of the State of [State].

11. Signatures

CLIENT: _____ Date: _____

KOSTKO HOMES, LLC: _____ Date: _____

Client Initials (Disclosure): _____ Client Initials (Non-Circumvention): _____

KoStKo Homes, LLC – Surplus Registry Division

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KoStKo Homes, LLC

Surplus Registry Division – Client Portal

Contact: Komed2@gmail.com • Website: kostkohomes.com

What to Expect

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7. Disbursement: Funds released.
8. Fee Collection: Per Agreement (preferred from proceeds).
9. Closeout: Completion summary and archived proof.

Downloads

Add your PDF links here (Recovery Agreement, Disclosure Sheet, etc.).

KoStKo Homes, LLC – Surplus Registry Division

Client Disclosure Sheet

IMPORTANT DISCLOSURE – SURPLUS FUNDS RECOVERY ASSISTANCE

Public records indicate surplus (excess proceeds) may be available in your name from a prior tax sale or foreclosure. These funds are held by a county or government office and generally belong to the former owner or heirs.

You may claim these funds yourself directly through the county at no cost.

KoStKo Homes, LLC – Surplus Registry Division offers optional assistance with research, documentation, filing, and follow-up. We are not a law firm and do not provide legal advice. We do not guarantee recovery.

If you choose to hire KoStKo Homes, our fee is contingency-based (30–40% of funds actually recovered). No recovery = no fee.

Client Initials: _____ Date: _____

KoStKo Homes, LLC – Surplus Registry Division

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KOSTKO HOMES, LLC: _____ Date: _____

Client Initials (Disclosure): _____ Client Initials (Non-Circumvention): _____

KoStKo Homes, LLC – Surplus Registry Division

Non-Circumvention Clause

NON-CIRCUMVENTION CLAUSE (STANDALONE)

Client agrees not to bypass or circumvent KoStKo Homes, LLC after receiving notice, identification, or claim preparation assistance related to the identified surplus funds during the term of the agreement. This clause survives termination and applies to any recovery of the identified funds arising from such notice or assistance.

KoStKo Homes, LLC – Surplus Registry Division

Client Disclosure Sheet

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KoStKo Homes, LLC – Surplus Registry Division

Fee Enforcement Playbook

FEE ENFORCEMENT PLAYBOOK (LOW■CONFLICT)

Goal: Collect fees professionally without disputes, using transparency and clear process.

Preferred collection (best):

- Fee paid directly from recovered proceeds (joint endorsement / escrow / authorized disbursement).

If county pays Client directly:

- 1) Same day funds are confirmed received, send invoice and payment instructions.
- 2) Payment due within 5 business days (per Agreement).
- 3) Friendly reminder on Day 3.
- 4) Formal notice on Day 7 referencing Agreement terms.
- 5) Escalate only if necessary (collections / small claims / counsel) and only after documenting all work performed.

Dispute prevention:

- Full disclosure upfront (Client can self■file).
- Signed agreement + initials on disclosure and non■circumvention.
- Document proof-of-work (emails, filings, calls, screenshots, submission receipts).

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KoStKo Homes, LLC – Surplus Registry Division

State Addendum – AZ

Addendum – AZ

ARIZONA ADDENDUM (AZ)

Notes: Use “Public Records Request” terminology when contacting offices. Confirm whether funds are held by Treasurer, Clerk, or another office. Document response times and any fee schedules.

KoStKo Homes, LLC – Surplus Registry Division

State Addendum – AZ

Addendum – AZ

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