

Escrow: _____

COUNTY ASSESSOR

PRELIMINARY CHANGE OF OWNERSHIP REPORT

To be completed by the transferee (buyer) prior to a transfer of subject property in accordance with section 480.3 of the Revenue and Taxation Code. A *Preliminary Change of Ownership Report* must be filed with each conveyance in the County Recorder's office for the county where the property is located. Please answer all questions in each section, and sign and complete the certification before filing. This form may be used in all 58 California counties. If a document evidencing a change in ownership is presented to the Recorder for recordation without the concurrent filing of a *Preliminary Change of Ownership Report*, the Recorder may charge an additional recording fee of twenty dollars (\$20).

NOTICE: The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the County Assessor. Supplemental assessments are not paid by the title or escrow company at close of escrow, and are not included in lender impound accounts. **You may be responsible for the current or upcoming property taxes even if you do not receive the tax bill.**

SELLER/TRANSFEROR	ASSESSOR'S PARCEL NUMBER
BUYER/TRANSFeree	BUYER'S DAYTIME TELEPHONE NUMBER
STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY	

MAIL PROPERTY TAX INFORMATION TO (NAME)

ADDRESS	CITY	STATE	ZIP CODE
<input type="checkbox"/> YES <input type="checkbox"/> NO This property is intended as my principal residence. If YES, please indicate the date of occupancy or intended occupancy		MO	DAY YEAR

PART 1. TRANSFER INFORMATION*Please complete all statements*

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	A. This transfer is solely between spouses (<i>addition or removal of a spouse, death of a spouse, divorce settlement, etc.</i>).
<input type="checkbox"/>	<input type="checkbox"/>	B. This transfer is solely between domestic partners currently registered with the California Secretary of State (<i>addition or removal of a partner, death of a partner, termination settlement, etc.</i>).
<input type="checkbox"/>	<input type="checkbox"/>	* C. This is a transfer between: <input type="checkbox"/> parent(s) and child(ren) <input type="checkbox"/> grandparent(s) and grandchild(ren).
<input type="checkbox"/>	<input type="checkbox"/>	* D. This transaction is to replace a principal residence by a person 55 years of age or older. Within the same county? <input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/>	<input type="checkbox"/>	* E. This transaction is to replace a principal residence by a person who is severely disabled as defined by Revenue and Taxation Code section 69.5. Within the same county? <input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/>	<input type="checkbox"/>	F. This transaction is only a correction of the name(s) of the person(s) holding title to the property (e.g., a name change upon marriage). If YES, please explain: _____
<input type="checkbox"/>	<input type="checkbox"/>	G. The recorded document creates, terminates, or reconveys a lender's interest in the property.
<input type="checkbox"/>	<input type="checkbox"/>	H. This transaction is recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security interest (e.g., <i>cosigner</i>). If YES, please explain: _____
<input type="checkbox"/>	<input type="checkbox"/>	I. The recorded document substitutes a trustee of a trust, mortgage, or other similar document.
<input type="checkbox"/>	<input type="checkbox"/>	J. This is a transfer of property: 1. to/from a revocable trust that may be revoked by the transferor and is for the benefit of <input type="checkbox"/> the transferor, and/or <input type="checkbox"/> the transferor's spouse <input type="checkbox"/> registered domestic partner.
<input type="checkbox"/>	<input type="checkbox"/>	2. to/from a trust that may be revoked by the creator/grantor/trustor who is also a joint tenant, and which names the other joint tenant(s) as beneficiaries when the creator/grantor/trustor dies.
<input type="checkbox"/>	<input type="checkbox"/>	3. to/from an irrevocable trust for the benefit of the <input type="checkbox"/> creator/grantor/trustor and/or <input type="checkbox"/> grantor's/trustor's spouse <input type="checkbox"/> grantor's/trustor's registered domestic partner.
<input type="checkbox"/>	<input type="checkbox"/>	4. to/from an irrevocable trust from which the property reverts to the creator/grantor/trustor within 12 years.
<input type="checkbox"/>	<input type="checkbox"/>	K. This property is subject to a lease with a remaining lease term 35 years or more including written options.
<input type="checkbox"/>	<input type="checkbox"/>	L. This is a transfer between parties in which proportional interests of the transferor(s) and transferee(s) in each and every parcel being transferred remain exactly the same after the transfer.
<input type="checkbox"/>	<input type="checkbox"/>	M. This is a transfer subject to subsidized low-income housing requirements with governmentally imposed restrictions.
<input type="checkbox"/>	<input type="checkbox"/>	N. This transfer is to the first purchaser of a new building containing an active solar energy system.

*If you checked YES to statements C, D, or E, you may qualify for a property tax reassessment exclusion, which may allow you to maintain your previous tax base. If you checked YES to statement N, you may qualify for a property tax new construction exclusion. A claim form must be filed and all requirements met in order to obtain any of these exclusions. Contact the Assessor for claim forms.

Please provide any other information that will help the Assessor understand the nature of the transfer

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION

PART 2. OTHER TRANSFER INFORMATION

Check and complete as applicable.

A. Date of transfer, if other than recording date: _____

B. Type of transfer:

- ☐ Purchase ☐ Foreclosure ☐ Gift ☐ Trade or exchange ☐ Merger, stock, or partnership acquisition (Form BOE-100-B)
☐ Contract of sale. Date of contract: _____ ☐ Inheritance, Date of death: _____
☐ Sale/Leaseback ☐ Creation of a lease ☐ Assignment of a lease ☐ Termination of a lease, Date lease began: _____
Original term in years (including written options): _____ Remaining term in years (including written options): _____
☐ Other. Please explain: _____

C. Only a partial interest in the property was transferred. ☐ Yes ☐ No If YES, indicate the percentage transferred: _____ %

PART 3. PURCHASE PRICE AND TERMS OF SALE

Check and complete as applicable.

A. Total purchase or acquisition price. Do not include closing costs or mortgage insurance.

\$ _____

Down payment \$ _____ Interest rate: _____ % Seller-paid points or closing costs: \$ _____

Balloon payment: \$ _____

☐ Loan carried by seller ☐ Assumption of Contractual Assessment* with a remaining balance of \$ _____

*An assessment used to finance property-specific improvements that constitutes a lien against the real property.

B. The property was purchased. ☐ Through real estate broker. Broker name _____ Phone number (____) _____

☐ Direct from seller ☐ From a family member

☐ Other. Please explain: _____

C. Please explain any special terms, seller concessions, financing, and any other information (e.g., buyer assumed the existing loan balance) that would assist the Assessor in the valuation of your property.

PART 4. PROPERTY INFORMATION

Check and complete as applicable.

A. Type of property transferred

- ☐ Single-family residence ☐ Co-op/Own-your-own ☐ Manufactured home
☐ Multiple-family residence. Number of units: _____ ☐ Condominium ☐ Unimproved lot
☐ Other. Description: (i.e., timber, mineral, water rights, etc.) ☐ Timeshare ☐ Commercial/Industrial

B. ☐ YES ☐ NO Personal/business property, or incentives, are included in the purchase price. Examples are furniture, farm equipment, machinery, club memberships, etc. Attach list if available.

If YES, enter the value of the personal/business property: \$ _____

C. ☐ YES ☐ NO A manufactured home is included in the purchase price.

If YES, enter the value attributed to the manufactured home: \$ _____

☐ YES ☐ NO The manufactured home is subject to local property tax. If NO, enter decal number: _____

D. ☐ YES ☐ NO The property produces rental or other income.

If YES, the income is from: ☐ Lease/rent ☐ Contract ☐ Mineral rights ☐ Other: _____

E. The condition of the property at the time of sale was: ☐ Good ☐ Average ☐ Fair ☐ Poor

CERTIFICATION

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true and correct to the best of my knowledge and belief. This declaration is binding on each and every buyer/transferee

SIGNATURE OF BUYER/TRANSFeree OR CORPORATE OFFICER

DATE

NAME OF BUYER/TRANSFeree/LEGAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT)

TITLE

E-MAIL ADDRESS