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CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER FROM GRANDPARENT TO GRANDCHILD

(Make necessary corrections to the printed name and mailing address.)

☐ Homeowners' Exemption ☐ Disabled Veterans' Exemption

5. Did you own this property as a joint tenant? ☐ Yes ☐ No

3. Was real property other than the principal residence of the transferor transferred?

Yes

No

If the transfer was through the medium of a trust, you must attach a copy of the trust.

4. Was only a partial interest in the property transferred? ☐ Yes ☐ No If yes, percentage transferred _____%.

Print name(s) of child(ren) of transferor(s)/seller(s) who is(are) the parent(s) of transferee(s) (grandchild):

NAME AND MAILING ADDRESS

David Peets
Alpine County Assessor / Recorder
PO Box 155
Markleeville, CA 96120
Ph: (530) 694-2283

A. PROPERTY ASSESSOR'S PARCEL NUMBER PROPERTY ADDRESS DATE OF PURCHASE OR TRANSFER RECORDER'S DOCUMENT NUMBER DATE OF DEATH OF GRANDPARENT (if applicable) PROBATE NUMBER (if applicable) The disclosure of social security numbers is mandatory as required by Revenue and Taxation Code section 63.1. [See Title 42 United States Code, section 405(c)(2)(C)(i) which authorizes the use of social security numbers for identification purposes in the administration of any tax.] A foreign national who cannot obtain a social security number may provide a tax identification number issued by the Internal Revenue Service. The numbers are used by the Assessor and the state to monitor the exclusion limit. B. TRANSFEROR(S)/SELLER(S) (GRANDPARENTS) 1. Print full name(s) of transferor(s) _ 2. Was this property the principal residence of the transferor?

Yes

No If yes, please check which one of the following exemptions was granted or was eligible to be granted on this property:

CERTIFICATION

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and any accompanying statements are true and correct to the best of my knowledge and that I am the grandparent (or their legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.

SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	DATE
SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	DATE
MAILING ADDRESS	DAYTIME PHONE NUMBER ()
CITY, STATE, ZIP	EMAIL ADDRESS

C.	. TRANSFEREE(S)/BUYER(S) (GRANDCHILD) (additional transferees please complete "C" below)		
	1.	Print full name(s) of transferee(s)	
		Family relationship(s) to transferor(s)	
		If adopted, age at time of adoption Adopted by whom?	
	_		
	2.	Parent: Name of direct descendent of grandparent (son or daughter)	
		Date of death of direct descendent	
		(Direct descendent must be deceased in order to qualify for this exclusion. Please provi	ide death certificate.)
		Social security number of direct descendent:	
		 a. Was deceased parent married or in a registered domestic partnership (registered r. State) as of the date of death? ☐ Yes ☐ No 	neans registered with the California Secretary of
	 b. Is the spouse or registered domestic partner of the deceased parent a (check one): Parent of the grandchild (go to question c). Stepparent of the grandchild (a stepparent to the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild (a stepparent to the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the condition that "all of the parent of the grandchild need not be deceased in meeting the grandchild need need need need need need need ne		
		of the grandchild must be deceased) (go to question 3).	wannin as of the date of words are an transfer of
		 c. Had surviving spouse/partner remarried or entered into a registered domestic part ☐ Yes ☐ No 	nership as of the date of purchase or transfer?
		If yes , date of marriage or registration of the domestic partnership must have occurred for exclusion. Date of marriage/partnership registration:	
		If no , surviving spouse/partner is still considered a child of grandparents and must a to qualify for exclusion. Date of death (<i>Please prov</i>	
	3. Did transferee receive a principal residence from parents? (If transferee has already received an excludable principal residence, or interest therein, from parents, then the purchase or transfer of a principal residence from grandparents will not be excluded as a principal residence but will be applied toward the one million dollar (\$1,000,000) full cash value limit exclusion of other real property received from parents.) Yes No		
		If yes: County: Assessor's Parcel Numb 4. Did transferee receive real property other than a principal residence from dec	
Not	e: ˈ	grandparents? (If transferee has already received an excludable principal residence, or in transfer of a principal residence from grandparents will not be excluded as a principal redollar (\$1,000,000) full cash value limit exclusion of other real property received from delifyes, attach list of all previous transfers (include for each property: the county, Assessonames of all transferees, and the family relationship). Note: The Assessor may require additional legal documentation to support the above answers.	sidence but will be applied toward the one million eceased parents.) Yes No
		ADDITIONAL TRANSFEREE(S)/BUYER(S) (GRANDCHILI	N (continued)
		NAME	RELATIONSHIP
		IV.WIE	NED/III
		CERTIFICATION	
true cert	an ify	l certify (or declare) under penalty of perjury under the laws of the State of California that the t true and correct to the best of my knowledge and that I am the grandchild (or their legal repres certify that all my parents who qualify as children of my transferor grandparents are deceased a of the transferees are eligible transferees within the meaning of section 63.1 of the Revenue an	sentative) of the transferors listed in Section B. I is of the date of transfer or purchase, and that all
SIGI	TAI	SIGNATURE OF TRANSFEREE OR LEGAL REPRESENTATIVE	DATE
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CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN GRANDPARENT AND GRANDCHILD

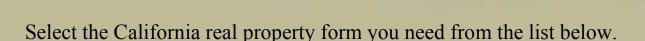
Revenue and Taxation Code, Section 63.1

IMPORTANT: In order to qualify for this exclusion, a claim form must be completed and signed by the transferors and a transferee and filed with the Assessor. A claim form is timely filed if it is filed within three years after the date of purchase or transfer, or prior to the transfer of the real property to a third party, whichever is earlier. If a claim form has not been filed by the date specified in the preceding sentence, it will be timely if filed within six months after the date of mailing of a notice of supplemental or escape assessment for this property. If a claim is not timely filed, the exclusion will be granted beginning with the calendar year in which you file your claim. Complete all of Sections A, B, and C and answer each question or your claim may be denied. Proof of eligibility, including a copy of the transfer document, trust, or will, may be required.

- 1. This exclusion only applies to transfers that occur on or after March 27, 1996;
- 2. In order to qualify, all the parents of that grandchild **must** be deceased as of the date of purchase or transfer. As used in the preceding sentence, parents are those persons who qualify under section 63.1 as children of the grandparents. However, for transfers that occur on or after January 1, 2006, a son-in-law or daughter-in-law of the grandparent that is a stepparent to the grandchild need not be deceased in meeting the condition that "all of the parents" of the grandchild must be deceased.
- 3. In order to qualify, the real property must be transferred from grandparents to their grandchildren;
- 4. If you do not complete and return this form, it may result in this property being reassessed.
- 5. California law provides, with certain limitations, that a "change in ownership" does not include the purchase or transfer of:
 - The principal residence between parents and children, and/or
 - The first \$1,000,000 of other real property between parents and children.

NOTE: Effective January 1, 2009, Revenue and Taxation Code Section 63.1(j) allows a county board of supervisors to authorize a one-time processing fee of not more than \$175 to recover costs incurred by the county assessor due to the failure of an eligible transferee to file a claim for the grandparent-grandchild change in ownership exclusion after two written requests have been sent to an eligible transferee by the county assessor.





California Quit Claim Deed Form: http://www.deeds.com/forms/california/quit-claim-deed/

California Warranty Deed Form: http://www.deeds.com/forms/california/warranty-deed/

California Special Warranty Deed Form: http://www.deeds.com/forms/california/special-warranty-deed/

California Grant Deed Form: http://www.deeds.com/forms/california/grant-deed/

California Interspousal Transfer Grant Deed: http://www.deeds.com/forms/california/interspousal-transfer-grant-deed/

California Grant Deed for Life Estate: http://www.deeds.com/forms/california/grant-deed-for-life-estate/

California Easement Deed Form: http://www.deeds.com/forms/california/easement-deed/

California Affidavit Death of Joint Tenant Forms: http://www.deeds.com/forms/california/affidavit-death-of-joint-tenant/

California Long Form Deed of Trust: http://www.deeds.com/forms/california/long-form-deed-of-trust/

California Short Form Deed of Trust: http://www.deeds.com/forms/california/short-form-deed-of-trust/

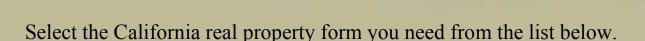
California Deed of Full Reconveyance: http://www.deeds.com/forms/california/deed-of-full-reconveyance/

California Substitution of Trustee and Full Reconveyance Forms: http://www.deeds.com/forms/california/substitution-of-trustee-and-full-reconveyance/

California Short Form Deed of Trust with Assignments of Rents Forms: http://www.deeds.com/forms/california/short-form-deed-of-trust-with-assignments-of-rents/

California Correction Deed: http://www.deeds.com/forms/california/correction-deed/





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California Correction Deed: http://www.deeds.com/forms/california/correction-deed/