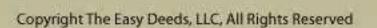
## DEEDS.COM Official Deed Forms



## OFFICE OF KENNETH W. BLAKEMORE, MAI, SAN JOAQUIN COUNTY ASSESSOR 44 N. SAN JOAQUIN STREET SUITE 230, STOCKTON, CA 95202-3273 PHONE: (209) 468-9916

BOE-58-G (P1) REV. 13 (06-11)

## CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER FROM GRANDPARENT TO GRANDCHILD

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)

Recorded:
Use Code:

A processing fee of no more than \$175 may be charged for claims filed untimely. The fee will apply if a claim is filed more than 60 days after the date of a second notice of potential eligibility has been sent by the county assessor.

A. PF	ROPERTY					
ASSESSOR'S PARCEL NUMBER  DATE OF PURCHASE OR TRANSFER		PROPERTY ADDRESS	PROPERTY ADDRESS  RECORDER'S DOCUMENT NUMBER			
		RECORDER'S DOCUMENT N				
DATE O	F DEATH OF GRANDPARENT (if applicable)	PROBATE NUMBER (if application	PROBATE NUMBER (if applicable)			
States tax.] A	lisclosure of social security numbers is mandatory is Code, section 405(c)(2)(C)(i) which authorizes the use A foreign national who cannot obtain a social security is the numbers are used by the Assessor and the state	e of social security numbers i number may provide a tax i	for identification purposes in the administration of any			
B. TI	RANSFEROR(S)/SELLER(S) (GRANDPARENTS)					
Print full name(s) of transferor(s)						
3. 4. 5. 6.	<ol> <li>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:         ☐ Homeowners' Exemption ☐ Disabled Veterans' Exemption</li> <li>Was real property other than the principal residence of the transferred? ☐ Yes ☐ No</li> <li>Was only a partial interest in the property transferred? ☐ Yes ☐ No If yes, percentage transferred</li></ol>					
		CERTIFICATION				
true a knowi	fy (or declare) under penalty of perjury under the laws nd correct to the best of my knowledge and that I am th ngly am granting this exclusion and will not file a claim to section 69.5.	ne grandparent (or their legal i	representative) of the transferees listed in Section C. I			
IGNATU	RE OF TRANSFEROR OR LEGAL REPRESENTATIVE		DATE			
IGNATU	RE OF TRANSFEROR OR LEGAL REPRESENTATIVE		DATE			
IAILING A	ADDRESS		DAYTIME PHONE NUMBER			
ITY, STA	ATE, ZIP		EMAIL ADDRESS			

( )	C. T	RANSFEREE(S)/BUYER(S) (GRANDCHILD) (additional transfer	rees please comple	ete "C" below)			
Family relationship(s) to transferor(s)   If adopted, age at time of adoption		Drint full name (a) of transference					
Parent. Name of direct descendent of grandparent (son or daughter)	1.						
2. Parent: Name of direct descendent of grandparent (son or daughter)  Date of death of direct descendent grandparent (son or daughter)  Date of death of direct descendent:  a. Was deceased parent married or in a registered domestic partnership (registered means registered with the California Secretary of Sterle as of the date of death?   Yes   No  b. Is the spouse or registered domestic partner of the deceased parent a (check one):    Parent of the grandchild (ps of question c).    Stepparent of the grandchild (ps of question c).    Stepparent of the grandchild (ps of question c).    Stepparent of the grandchild (ps of question c).    Yes   No  If yes, date of marriage or registeration of the domestic partnership must have occurred prior to the date of purchase or transfer to qualify for exclusion. Date of marriage or registeration of the date of purchase or transfer to qualify for exclusion. Date of death   Yes, and the parent is still considered a child of grandparents and must also be deceased prior to the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion. Date of death   Yes, and the purchase or transfer to qualify for exclusion of the purchase or transfer to qualify for exclusion of the purchase or transfer to purchase or transfer to qualify for exclusion or the purchase or transfer to qualify for exclusion or transfer or 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 an excludation principal residence ton will be applied toward the one million dollar (\$1.000.000) full cash							
Date of death of direct descendent  (Direct descendent must be deceased in order to qualify for this exclusion. Please provide death certificate.)  Social security number of direct descendent:  a. Was deceased parent married or in a registered domestic partnership (registered means registered with the California Secretary of State) as of the date of death? "Yes \  \text{No.} \		If adopted, age at time of adoption Adopted by whom?					
(Direct descendent must be deceased in order to qualify for this exclusion. Please provide death certificate.)  Social security number of direct descendent:  a. Was deceased parent married or in a registered domestic partnership (registered means registered with the California Secretary of State) as of the date of death?   level   loo	2.	. Parent: Name of direct descendent of grandparent (son or daughter)					
Social security number of direct descendent:  a. Was deceased parent married or in a registered domestic partnership (registered means registered with the California Secretary of State) as of the date of death?   "es"   No b. Is the spouse or registered domestic partner of the deceased parent a (check one):							
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State) as of the date of death?   Yes   No							
Parent of the grandchild (ago to question c).   Stepparent of the grandchild as Espapearth to the grandchild need not be deceased in meeting the condition that "all of the parents" of the grandchild must be deceased) (go to question 3).   C. Had surviving spouse/partner remarried or entered into a registered domestic partnership as of the date of purchase or transfer to qualify for exclusion. Date of marriage-partnership registration:							
Steparent of the granchild (a steparent to the grandchild need not be deceased in meeting the condition that "all of the parents" of the grandchild must be deceased (go to question 3).  c. Had surviving spouse/partner remarried or entered into a registered domestic partnership as of the date of purchase or transfer?   Yes   No		b. Is the spouse or registered domestic partner of the deceased parent a (check one):					
c. Had surviving spouse/partner remarried or entered into a registered domestic partnership as of the date of purchase or transfer?  Yes, date of marriage or registration of the domestic partnership must have occurred prior to the date of purchase or transfer to qualify for exclusion. Date of marriage/partnership registration:  (Please provide marriage)  If no, surviving spouse/partner is still considered a child of grandparents and must also be deceased prior to the purchase or transfer to qualify for exclusion. Date of death  (Please provide death certificate.)  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 \( \subseteq \text{ No County:} \)  Assessor's Parcel Number:  4. Did transferee receive real property other than a principal residence from deceased parent who is a direct descendent of grandparents? (If transfere has already received an excludable 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 deceased parents.) \( \text{ Yes} \)  Note: The Assessor may require additional legal documentation to support the above answers.  **CERTIFICATION**  **CERTIFICATION**  **CERTIFICATION**  **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 grandchild (or their legal representative) of the transferors listed in Section B. I certify that all my parents who qualify as children of my transferor grandparents are deceased as of the date of transfer or purchase, and that all of the tra							
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for exclusion. Date of marriage/partnership registration:							
to qualify for exclusion. Date of death		for exclusion. Date of marriage/partnership registration: (Please provide marriage or partnership					
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( )	SIGNATU	JRE OF TRANSFEREE OR LEGAL REPRESENTATIVE		DATE			
CITY, STATE, ZIP EMAIL ADDRESS	MAILING ADDRESS			DAYTIME PHONE NUMBER			
$\mathbf{I}$	CITY, STATE, ZIP			EMAIL ADDRESS			

## CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN GRANDPARENT AND GRANDCHILD

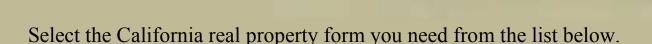
Revenue and Taxation Code, Section 63.1

**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: <a href="http://www.deeds.com/forms/california/quit-claim-deed/">http://www.deeds.com/forms/california/quit-claim-deed/</a>

California Warranty Deed Form: <a href="http://www.deeds.com/forms/california/warranty-deed/">http://www.deeds.com/forms/california/warranty-deed/</a>

California Special Warranty Deed Form: <a href="http://www.deeds.com/forms/california/special-warranty-deed/">http://www.deeds.com/forms/california/special-warranty-deed/</a>

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

California Interspousal Transfer Grant Deed: <a href="http://www.deeds.com/forms/california/interspousal-transfer-grant-deed/">http://www.deeds.com/forms/california/interspousal-transfer-grant-deed/</a>

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: <a href="http://www.deeds.com/forms/california/affidavit-death-of-joint-tenant/">http://www.deeds.com/forms/california/affidavit-death-of-joint-tenant/</a>

California Long Form Deed of Trust: <a href="http://www.deeds.com/forms/california/long-form-deed-of-trust/">http://www.deeds.com/forms/california/long-form-deed-of-trust/</a>

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

California Deed of Full Reconveyance: <a href="http://www.deeds.com/forms/california/deed-of-full-reconveyance/">http://www.deeds.com/forms/california/deed-of-full-reconveyance/</a>

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: <a href="http://www.deeds.com/forms/california/short-form-deed-of-trust-with-assignments-of-rents/">http://www.deeds.com/forms/california/short-form-deed-of-trust-with-assignments-of-rents/</a>

California Correction Deed: <a href="http://www.deeds.com/forms/california/correction-deed/">http://www.deeds.com/forms/california/correction-deed/</a>