

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.

ESCROW NO.: _____ TITLE NO.: _____
SELLER/TRANSFEROR: _____
BUYER/TRANSFEE: _____
ASSESSOR'S PARCEL NUMBER: _____
STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY: _____

LEGAL DESCRIPTION: _____

MAIL PROPERTY TAX INFORMATION TO: _____

BUYER'S DAYTIME TELEPHONE NUMBER: (____) _____

Table with 4 columns: YES/NO checkboxes, 'This property is intended as my principal residence...' text, MO, DAY, YEAR columns.

PART 1. TRANSFER INFORMATION

Please complete all statements.

- YES NO
A. This transfer is solely between spouses...
B. This transfer is solely between domestic partners...
C. This is a transfer between: parent(s) and child(ren) ...
D. This transaction is to replace a principal residence...
E. This transaction is to replace a principal residence by a person who is severely disabled...
F. This transaction is only a correction of the name(s) of the person(s) holding title...
G. The recorded document creates, terminates, or reconveys a lender's interest...
H. This transaction is recorded only as a requirement for financing purposes...
I. The recorded document substitutes a trustee of a trust, mortgage, or other similar document.
J. This is a transfer of property:
1. to/from a revocable trust that may be revoked...
2. to/from a trust that may be revoked by the creator/grantor/trustor...
3. to/from an irrevocable trust for the benefit of the...
4. to/from an irrevocable trust from which the property reverts...
K. This property is subject to a lease with a remaining lease term...
L. This is a transfer between parties in which proportional interests...
M. This is a transfer subject to subsidized low-income housing requirements...
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	

The Assessor's office may contact you for additional information regarding this transaction.