

Turn this in along with the deed whenever you change or add owners of real estate. The Recorder forwards it to the Assessor to change who receives tax bills and to re-assess the property under Prop 13, if applicable.

502-A-R16-0521-34001101-1
5-502-A(P1) REV. 16 (05-21)



CHRISTINA WYNN
SACRAMENTO COUNTY ASSESSOR
PROPERTY TRANSFER SECTION
3636 American River Drive, Suite 200
Sacramento, CA 95864-5952
Phone (916) 875-0750
FAX (916) 875-0755
www.assessor.saccounty.net

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 in each conveyance in the County Recorder's office for the county where the property is located.

NAME AND MAILING ADDRESS OF BUYER/TRANSFeree
(Make necessary corrections to the printed name and mailing address)

Robert Recipient
123 Main Street
Sacramento, CA 95814

ASSESSOR'S PARCEL NUMBER
12-345-6789

SELLER/TRANSFEROR
Frankie Former-Owner

BUYER'S DAYTIME TELEPHONE NUMBER
(916) 555-1212

BUYER'S EMAIL ADDRESS
rrecipient@uvwxyz.com

STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY
123 Main Street, Sacramento

YES NO This property is intended as my principal residence. If YES, please indicate the date of occupancy or intended occupancy. MO **01** DAY **17** YEAR **2021**

YES NO Are you a disabled veteran, or the unmarried surviving spouse of a disabled veteran, who, due to a service connected injury or disease, was either rated 100% disabled or compensated at 100% due to unemployment by the Department of Veterans Affairs?

MAIL PROPERTY TAX INFORMATION TO (NAME)

Robert Recipient

MAIL PROPERTY TAX INFORMATION TO (ADDRESS)

123 Main Street

CITY

Sacramento

STATE ZIP CODE

CA 95814

PART 1. TRANSFER INFORMATION

Please complete all statements.

This section contains possible exclusions from reassessment for certain types of transfers.

- Between spouses/
domestic partners
- Between parents/
grandparents and
children
- Death of one owner
- Replacing home of senior
or disabled person
- Name change
- Beginning or end of
mortgage
- Required for financing
- Substitution of trustee
- Into or out of family trust
- Long-term lease
- Change in title, between
the same owners
- Low income housing
- New solar construction

- YES NO
- A. This transfer is solely between spouses (addition or removal of a partner, death of a partner, termination settlement, etc.)
 - B. This transfer is solely between domestic partners currently in a domestic partnership.
 - C. This is a transfer: between parent(s) and child(ren) between grandparent(s) and grandchild(ren). Was this the transferor/grantor's principal residence? YES NO
 - D. This transfer is the result of a cotenant's death. Date of death: _____
 - E. This transaction is to replace a principal residence of the transferee. Within the same county? YES NO
 - F. This transaction is to replace a principal residence by the transferee. Within the same county? YES NO
 - G. This transaction is to replace a principal residence of the transferee with the Governor proclaimed a state of emergency. Within the same county? YES NO
 - H. This transaction is only a correction of the name(s) of the transferee. If YES, please explain: _____
 - I. The recorded document creates, terminates, or records a mortgage.
 - J. This transaction is recorded only as a requirement for a deed (e.g., co-signer). If YES, please explain: _____
 - K. The recorded document substitutes a trustee of a trust.
 - L. This is a transfer of property:
 1. to/from a revocable trust that may be revoked by the transferee, the transferor, and/or the transferor's spouse.
 2. to/from an irrevocable trust for the benefit of the transferee, the transferor, and/or the transferor's spouse.
 - M. This property is subject to a lease with a remaining term of less than 10 years.
 - N. This is a transfer between parties in which proportionate shares of the property being transferred remain exactly the same after the transfer.
 - O. This is a transfer subject to subsidized low-income housing restrictions imposed by specified nonprofit corporations.
 - P. This transfer is to the first purchaser of a new building containing a leased owned active solar energy system.
 - Q. Other. This transfer is to _____

TRANSFER INFORMATION

Check either "Yes" or "No" for all options.

Usually zero or one will apply.

Most will be "No."

These statements are reasons your transfer may be exempt from reassessment.

In some cases, no statement applies (for instance sales, gifts between siblings, etc.) Such transfers will trigger reassessment.

* Please refer to the instructions for Part 1. 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: _____
 - 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 price \$ _____
- B. Cash down payment or value of trade or exchange excluding closing costs Amount \$ _____
- C. First deed of trust @ _____ % interest for _____ years.
 - FHA (Discount Points) Cal-Vet VA (Discount Points)
 - Bank/Savings & Loan/Credit Union Loan carried by _____
 - Balloon payment \$ _____ Due date: _____
- D. Second deed of trust @ _____ % interest for _____ years.
 - Fixed rate Variable rate Bank/Savings & Loan
 - Balloon payment \$ _____ Due date: _____
- E. Was an Improvement Bond or other public financing assumed by the buyer? YES NO Outstanding balance \$ _____
- F. Amount, if any, of real estate commission fees paid by the buyer which are not included in the purchase price _____
- G. The property was purchased: Through real estate broker. Broker name: _____ Phone number: _____
 - Direct from seller From a family member-Relationship _____
 - Other. Please explain: _____
- H. Please explain any special terms, seller concessions, broker/agent fees waived, financing, and any other information (including existing loan balance) that would assist the Assessor in the valuation of your property. _____

If this transfer is not a purchase, put \$0 in line "A" and skip to Part 4.

Is this transfer a "gift"?

A "gift" means no money, property, or services changes hands.

Taking over mortgage payments counts as money changing hands – the new owner has essentially paid the outstanding mortgage for the old owner.

! If it is a gift, the donor should ask their tax advisor whether they must file a gift tax return this year.

Describe the property being transferred, and any included personal property or manufactured homes.

Fill this out even if you did not pay a "purchase price."

PART 4. PROPERTY INFORMATION

Check and complete as applicable.

- A. Type of property transferred
 - Single-family residence Co-op/Own-your-own
 - Multiple-family residence. Number of units: _____ Condominium
 - Other. Description: (i.e., timber, mineral, water rights, etc.) _____ Timeshare
- B. YES NO Personal/business property, or incentives, provided by seller to buyer are included in the purchase price. Examples of incentives are club memberships.
 - If YES, enter the value of the personal/business property: \$ _____ Incentives \$ _____
- 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
 - Please describe: _____

CERTIFICATION

I certify (or declare) 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.

SIGNATURE OF BUYER/TRANSFEEE OR CORPORATE OFFICER	DATE	TELEPHONE ()
NAME OF BUYER/TRANSFEEE/PERSONAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT)	TITLE	EMAIL ADDRESS



A new owner fills out, dates, and signs the PCOR. It does NOT need to be notarized.