

Recording requested by (name):
Dora Sample

The name of the person who will be turning the deed in to the recorder's office.

When recorded mail to and mail tax statements to:

The name and address of the people who will receive stamped deed and the tax statements.

Dora Sample

123 Main St.

Sacramento, CA 95814

The APN (assessor's parcel number) of the property. This is on the current deed.

Recorder's Use Only

AFFIDAVIT – DEATH OF TRANSFEROR (TOD DEED)

Declaration of Exemption From Gov't Code § 27388.1 Fee

- Transfer is exempt from fee per GC § 27388.1(a)(2):
 - recorded concurrently "in connection with" transfer subject to Documentary Transfer Tax
 - recorded concurrently "in connection with" a transfer of residential dwelling to an owner-occupier
- Transfer is exempt from fee per GC 27388.1(a)(1):
 - Fee cap of \$225.00 reached
 - Not related to real prop

Assessor's Parcel No. (APN):
123-456-7890-0000

Enter when the TOD deed was signed, when it was filed, and what number the Recorder's Office gave it. This info is on the top right hand side of the TOD deed. ★

Dora Sample Beneficiary filing Affidavit

and says:

List the beneficiaries and (optional) their relationship to the deceased person.

Enter the exact legal description as shown on the current deed.

OR: attach the description on a separate piece of paper labeled "Exhibit A" and type or write "See Exhibit A" in this space.

1. Sara Sample Decedant's name as written on death certificate, the decedent mentioned in the

attached certified copy of Certificate of Death is the same person as

Sara Sample Decedent's name as written on TOD the transferor under the

Revocable Transfer on Death Deed dated March 12, 2022 and recorded on March 14, 2022

as Instrument No. 202203140000 in Book/Reel _____, Page/Image _____, of

the Official Records of Sacramento County, California, which named as

beneficiary(ies) Dora Sample, her daughter, and Saul Sample, her son

_____ and

which transferred the following described property in Sacramento County,

California:

Lot 14 of Blackacre Addition to the City of Sacramento, as delineated by the map of said addition, recorded January 30, 1965, in Book 625, page 01301965.

OR: attach a copy of the legal description marked "Exhibit A" and type or write "See Exhibit A" here.

2. I, Dora Sample, served the notice required by

Probate Code Section 5681.

Dated _____

Date and sign in front of notary

(Signature of declarant)

This declares that you have served the Notice of Revocable Transfer on Death Deed with a copy of the TOD deed and death certificate to all legal heirs.

Dora Sample

(Type or print name of declarant)

Only one beneficiary is required to fill this out – the same person who serves the Notice of Revocable Transfer on Death Deed to all legal heirs.

★ Note: Sacramento currently uses Instrument Numbers, but in the past they used Page/Image and Book/Reel numbers. Other counties use one or the other or both. Fill in whatever is on the TOD deed.

AFFIDAVIT –DEATH OF TRANSFEROR UNDER TOD DEED

Please note: Additional forms may be required, such as a “Change of Ownership Statement: Death of Real Property Owner,” a “Claim for Reassessment Exclusion,” or others. Visit www.assessor.saccounty.net/DeathOfRealPropertyOwner/Pages/default.aspx for info.

NEXT STEPS:

1. **Sign the Affidavit** in front of a notary public.
2. Fill out the **Preliminary Change of Ownership Report (PCOR)**. This form is required by the Assessor's Office. You can download a copy for Sacramento at www.assessor.saccounty.net. Each county has its own form; contact the assessor in the county where the property is located.
3. **Record the Affidavit and file the PCOR** at the Recorder's Office in the county where the property is located. If you attached the property description (instead of typing it out), be sure to include the attachment when you record the Affidavit.
4. **Fees:** There are two fees: a filing fee (currently \$20/first page plus \$3/additional page in Sacramento) and a \$75 Building Homes and Jobs Act fee. Current Sacramento fees are available at the [Sacramento County Recorder's](http://www.ccr.saccounty.net/Pages/Fees.aspx) website at www.ccr.saccounty.net/Pages/Fees.aspx.

There are some exemptions from the \$75 fee. If you qualify, fill out the exemption box on page one of the affidavit, or you will be charged. If not, leave it blank. For more information, visit the [California Land Title Association's](http://www.cita.org/page/SB2CountyDocs) information page at www.cita.org/page/SB2CountyDocs.

5. File any required **property tax reassessment exclusion claim** with the Assessor's Office. When property changes hands, it is "reassessed" for tax purposes, often causing a sizeable increase in property tax for the new owner. Certain transfers are excluded from reassessment, including SOME transfers to beneficiaries, such as children of the decedent.

For further information contact your local assessor's office. In Sacramento, visit www.assessor.saccounty.net/ExemptionExclusion/Pages/ExclusionsMoreInfo.aspx.

FOR MORE INFORMATION

- Sacramento County Clerk-Recorder's Office
<http://www.ccr.saccounty.net/>
- Sacramento County Assessor's Office
<http://www.assessor.saccounty.net/>

Sacramento County Public Law Library
609 9th Street, Sacramento, CA 95814
916-874-6012
www.saclaw.org