

**PRELIMINARY CHANGE OF OWNERSHIP REPORT**

**FOR RECORDER'S USE ONLY**

To be completed by transferee (buyer) prior to transfer of subject property in accordance with Section 480.03 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; this particular form may be used in all 58 counties of California.

**THIS REPORT IS NOT A PUBLIC DOCUMENT**

SELLER/TRANSFEROR:  
BUYER/TRANSFeree:  
ASSESSOR'S PARCEL NUMBER(S)  
PROPERTY ADDRESS OR LOCATION:

MAIL TAX INFORMATION TO:  
Name  
Address

**NOTICE:** A lien for property taxes applies to your property on March 1 of each year for the taxes owing in the following fiscal year, July 1 through June 30. One-half of these taxes is due November 1, and one-half is due February 1. The first installment becomes delinquent on December 10, and the second installment becomes delinquent on April 10. One tax bill is mailed before November 1 to the owner of record. **IF THIS TRANSFER OCCURS AFTER MARCH 1 AND ON OR BEFORE DECEMBER 31, YOU MAY BE RESPONSIBLE FOR THE SECOND INSTALLMENT OF TAXES DUE FEBRUARY 1.**

The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the County Assessor. For further information on your supplemental roll obligation, please call the County Assessor at .

**PART I: TRANSFER INFORMATION**

Please answer all questions.

- |                          |                          |  |
|--------------------------|--------------------------|--|
| YES                      | NO                       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | A. Is this transfer solely between husband and wife (Addition of a spouse, death of a spouse, divorce settlement, etc.)?                           |
| <input type="checkbox"/> | <input type="checkbox"/> | B. Is this transaction only a correction of the name(s) of the person(s) holding title to the property (For example, a name change upon marriage)? |
| <input type="checkbox"/> | <input type="checkbox"/> | C. Is this document recorded to create, terminate, or reconvey a lender's interest in the property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | D. Is this transaction recorded only to create, terminate, or reconvey a security interest (e.g. cosigner)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | E. Is this document recorded to substitute a trustee under a deed of trust, mortgage, or other similar document?                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | F. Did this transfer result in the creation of a joint tenancy in which the seller (transferor) remains as one of the joint tenants?               |
| <input type="checkbox"/> | <input type="checkbox"/> | G. Does this transfer return property to the person who created the joint tenancy (original transferor)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | H. Is this transfer of property:   |
| <input type="checkbox"/> | <input type="checkbox"/> | 1. to a trust for the benefit of the grantor, or grantor's spouse?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. to a trust revocable by the transferor?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. to a trust from which the property reverts to the grantor within 12 years?  |
| <input type="checkbox"/> | <input type="checkbox"/> | I. If this property is subject to a lease, is the remaining lease term 35 years or more including written options?                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | J. Is this a transfer from parents to children or from children to parents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | K. Is this transaction to replace a principal residence by a person 55 years of age or older?  |
| <input type="checkbox"/> | <input type="checkbox"/> | L. Is this transaction to replace a principal residence by a person who is severely disabled as defined by Revenue and Code Section 69.5?          |

If you checked yes to J, K, or L, an applicable claim form must be filed with the County Assessor. Please provide any other information that would help the Assessors to understand the nature of the transfer.

IF YOU HAVE ANSWERED "YES" TO ANY OF THE ABOVE QUESTIONS EXCEPT J, K, OR L, PLEASE SIGN AND DATE, OTHERWISE COMPLETE BALANCE OF THE FORM.

**PART II: OTHER TRANSFER INFORMATION**

- A. Date of transfer if other than recording date [\_\_\_\_\_].
- B. Type of transfer. Please check appropriate box.
- Purchase     Foreclosure     Gift     Trade or Exchange     Merger, Stock, or Partnership Acquisition
- Contract of Sale - Date of Contract [\_\_\_\_\_]
- Inheritance - Date of Death [\_\_\_\_\_]     Other: Please explain: [\_\_\_\_\_]
- Creation of 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) [\_\_\_\_\_]

C. Was only a partial interest in the property transferred?  Yes  No If yes, indicate the percentage transferred [\_\_\_\_\_]%

**PRELIMINARY CHANGE OF OWNERSHIP REPORT**

Please answer, to the best of your knowledge, all applicable questions, sign and date. If a question does not apply, indicate with "N/A."

**PART III: PURCHASE PRICE AND TERMS OF SALE**

- A. CASH DOWN PAYMENT OR Value of Trade or Exchange (excluding closing costs) Amount \$[\_\_\_\_\_]
- B. FIRST DEED OF TRUST @ [\_\_\_\_\_] % interest for [\_\_\_\_\_] years. Pymts/Mo.= \$[\_\_\_\_\_] (Prin. & Int. only) Amount \$[\_\_\_\_\_]  
 FHA  Fixed Rate  New Loan  
 Conventional  Variable Rate  Assumed Existing Loan Balance  
 VA  All inclusive D.T. (\$ [\_\_\_\_\_] Wrapped)  Bank or Savings & Loan  
 Cal-Vet  Loan Carried by Seller  Finance Company  
 Balloon Payment  Yes  No Due Date [\_\_\_\_\_] Amount \$ [\_\_\_\_\_]
- C. SECOND DEED OF TRUST @ [\_\_\_\_\_] % interest for [\_\_\_\_\_] years. Pymts/Mo.= \$[\_\_\_\_\_] (Prin. & Int. only) Amount \$[\_\_\_\_\_]  
 Bank or Savings & Loan  Fixed Rate  New Loan  
 Loan Carried by Seller  Variable Rate  Assumed Existing Loan Balance  
 Balloon Payment  Yes  No Due Date [\_\_\_\_\_] Amount \$ [\_\_\_\_\_]
- D. OTHER FINANCING: Is other financing involved not covered in (b) or (c) above?  Yes  No Amount \$[\_\_\_\_\_]  
 Type [\_\_\_\_\_] @ [\_\_\_\_\_] % interest for [\_\_\_\_\_] years. Pymts./Mo.= \$[\_\_\_\_\_] (Prin. & Int. only)  
 Bank or Savings & Loan  Fixed Rate  New Loan  
 Loan Carried by Seller  Variable Rate  Assumed Existing Loan Balance  
 Balloon Payment  Yes  No Due Date [\_\_\_\_\_] Amount \$ [\_\_\_\_\_]
- E. IMPROVEMENT BOND  Yes  No Outstanding Balance: Amount \$[\_\_\_\_\_]
- F. TOTAL PURCHASE PRICE (or acquisition price, if traded or exchanged, include real estate commission if paid.)  
 Total Items A through E \$ [\_\_\_\_\_]
- G. PROPERTY PURCHASED  Through a broker  Direct from seller  Other (explain) [\_\_\_\_\_]

If purchased through a broker, provide broker's name and phone number: [\_\_\_\_\_]

Please explain any special terms or financing and any other information that would help the Assessor understand the purchase price and terms of sale.

[\_\_\_\_\_] \_\_\_\_\_  
[\_\_\_\_\_] \_\_\_\_\_

**PART IV: PROPERTY INFORMATION**

- A. IS PERSONAL PROPERTY INCLUDED IN PURCHASE PRICE (other than a mobilehome subject to local property tax)?  Yes  No  
 If yes, enter the value of the personal property included in the purchase price \$[\_\_\_\_\_] (Attach itemized list of personal property).
- B. IS THIS PROPERTY INTENDED AS YOUR PRINCIPAL RESIDENCE?  Yes  No  
 If yes, enter date of occupancy [\_\_\_\_\_] / [\_\_\_\_\_] / [\_\_\_\_\_] or intended occupancy [\_\_\_\_\_] / [\_\_\_\_\_] / [\_\_\_\_\_] .  
 Month Day Year Month Day Year
- C. TYPE OF PROPERTY TRANSFERRED:  
 Single-family residence  Agricultural  Timeshare  
 Multiple-family residence (no. of units: [\_\_\_\_\_] )  Co-op/Own-your-own  Mobilehome  
 Commercial/Industrial  Condominium  Unimproved lot  
 Other (Description: [\_\_\_\_\_])
- D. DOES THE PROPERTY PRODUCE INCOME?  Yes  No
- E. IF THE ANSWER TO QUESTION D IS YES, IS THE INCOME FROM:  
 Lease/Rent  Contract  Mineral Rights  Other - Explain: [\_\_\_\_\_]
- F. WHAT WAS THE CONDITION OF PROPERTY AT THE TIME OF SALE?  
 Good  Average  Fair

Enter here, or on an attached sheet, any other information that would assist the Assessor in determining the value of the property such as the physical condition of the property, restrictions, etc.

[\_\_\_\_\_]

[\_\_\_\_\_]

*I certify that the foregoing is true, correct and complete to the best of my knowledge and belief.*

Signed [\_\_\_\_\_] Dated [\_\_\_\_\_] \_\_\_\_\_  
NEW OWNER/CORPORATE OFFICER

Please Print Name of New Owner/Corporate Officer [\_\_\_\_\_]

Phone Number where you are available from 8:00 a.m. - 5:00 p.m. [(\_\_\_\_\_) \_\_\_\_\_]

**(NOTE: The Assessor may contact you for further information)**

If a document evidencing a change of 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).