PART 1. TRANSFER INFORMATION

Please complete all statements.

YES  NO

A. This transfer is solely between spouses (addition or removal of a spouse, death of a spouse, divorce settlement, etc.).

B. This transfer is solely between domestic partners currently registered with the California Secretary of State (addition or removal of a partner, death of a partner, termination settlement, etc.).

C. This is a transfer between: ☐ parent(s) and child(ren) ☐ grandparent(s) and grandchild(ren).

D. This transaction is to replace a principal residence by a person 55 years of age or older.

Within the same county? ☐ YES ☐ NO

E. This transaction is to replace a principal residence by a person who is severely disabled as defined by Revenue and Taxation Code section 69.5. Within the same county? ☐ YES ☐ NO

F. This transaction is only a correction of the name(s) of the person(s) holding title to the property (e.g., a name change upon marriage). If YES, please explain:______________________________________________

G. The recorded document creates, terminates, or reconveys a lender’s interest in the property.

H. This transaction is recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security interest (e.g., cosigner). If YES, please explain:______________________________________________

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 by the transferor and is for the benefit of: ☐ the transferor, and/or ☐ the transferor’s spouse ☐ registered domestic partner.

2. to/from a trust that may be revoked by the creator/grantor/trustor who is also a joint tenant, and which names the other joint tenant(s) as beneficiaries when the creator/grantor/trustor dies.

3. to/from an irrevocable trust for the benefit of the ☐ creator/grantor/trustor and/or ☐ grantor’s/trustor’s spouse ☐ grantor’s/trustor’s registered domestic partner.

4. to/from an irrevocable trust from which the property reverts to the creator/grantor/trustor within 12 years.

K. This property is subject to a lease with a remaining lease term of 35 years or more including written options.

L. This is a transfer between parties in which proportional interests of the transferor(s) and transferee(s) in each and every parcel being transferred remain exactly the same after the transfer.

M. This is a transfer subject to subsidized low-income housing requirements with governmentally imposed restrictions.

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

☐ Multiple-family residence. Number of units: ________  ☐ Condominium  ☐ Manufactured home

☐ Other. Description: (i.e., timber, mineral, water rights, etc.)  ☐ Timeshare  ☐ Unimproved lot

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 if 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: $ ________________________

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

NAME OF BUYER/TRANSFEREE/LEGAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT)

E-MAIL ADDRESS

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