



GREGORY J. SMITH, SAN DIEGO COUNTY ASSESSOR / RECORDER / CLERK
1600 PACIFIC HIGHWAY, ROOM 103 • SAN DIEGO, CALIFORNIA 92101-2480
TELEPHONE (619) 531-5848

PRELIMINARY CHANGE OF OWNERSHIP REPORT

[To be completed by transferee (buyer) prior to transfer of subject property in accordance with section 480.3 of the Revenue and Taxation Code.] A Preliminary Change in 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.

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 _____

Phone Number (8 a.m. to 5 p.m.) (____) _____

FOR RECORDER'S USE ONLY

NV-O	NV-T
CSH	PP
AREA	

NOTICE: A lien for property taxes applies to your property on January 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. **You may be responsible for the current or upcoming property taxes even if you do not receive the tax bill.**

The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the San Diego County Assessor. For further information on your supplemental roll obligation, please call the Assessor Realty Division at (858) 505-6262. For information about this form, please call the Change in Ownership Section at (619) 531-5848.

PART I: TRANSFER INFORMATION (please answer all questions)

Yes No

- ☐ ☐ A. Is this transfer solely between husband and wife (addition of a spouse, death of a spouse, divorce settlement, etc.)?
- ☐ ☐ 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)?
Please explain _____
- ☐ ☐ C. Is this document recorded to create, terminate or reconvey a lender's interest in the property?
- ☐ ☐ D. Is this transaction recorded only as a requirement for financing purposes or to create, terminate or reconvey a security interest (e.g., cosigner)? Please explain _____
- ☐ ☐ E. Is this document recorded to substitute a trustee of a trust, mortgage or other similar document?
- ☐ ☐ F. Did this transfer result in the creation of a joint tenancy in which the seller (transferor) remains as one of the joint tenants?
- ☐ ☐ G. Does this transfer return property to the person who created the joint tenancy (original transferor)?
- ☐ ☐ H. Is this transfer of property:
- ☐ ☐ 1. to a revocable trust that may be revoked by the transferor and is for the benefit of the ☐ transferor ☐ transferor's spouse?
- ☐ ☐ 2. to a trust that may be revoked by the Creator/Grantor who is also a joint tenant, and which names the other joint tenant(s) as beneficiaries when the Creator/Grantor dies?
- ☐ ☐ 3. to an irrevocable trust for the benefit of the ☐ Creator/Grantor and/or ☐ Grantor's spouse?
- ☐ ☐ 4. to an irrevocable trust from which the property reverts to the Creator/Grantor within 12 years?
- ☐ ☐ I. If this property is subject to a lease, is the remaining lease term 35 years or more including written options?
- ☐ ☐ *J. Is this a transfer between ☐ parent(s) and child(ren)? ☐ or from grandparent(s) to grandchild(ren)?
- ☐ ☐ *K. Is this transaction to replace a principal residence by a person 55 years of age or older? Within the same county? ☐ Yes ☐ No
- ☐ ☐ *L. Is this transaction 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
- ☐ ☐ M. Is this transfer solely between domestic partners currently registered with the California Secretary of State?

*If you checked yes to J, K or L, you may qualify for a property tax reassessment exclusion, which may result in lower taxes on your property. **If you do not file a claim, your property will be reassessed.**

Please provide any other information that will help the Assessor to understand the nature of the transfer.

If the conveying document constitutes an exclusion from a change in ownership as defined in section 62 of the Revenue and Taxation Code for any reason other than those listed above, set forth this specific exclusions claimed: _____

Please answer all questions in each section. If a question does not apply, indicate with "N/A". Sign and date at bottom of second page.

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 a Lease ☐ Assignment of a Lease ☐ Termination of a Lease ☐ Sale/Leaseback
- ☐ Date Lease began _____
- ☐ Original term in years (including written options) _____
- ☐ Remaining term in years (including written options) _____
- Monthly Payment _____ Remaining Term _____
- C. Was only a partial interest in the property transferred? ☐ Yes ☐ No
- If **yes**, indicate the percentage transferred _____%.

Please answer, to the best of your knowledge, all applicable questions, then 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 (_____ Discount Points) ☐ Fixed Rate ☐ New Loan
☐ Conventional ☐ Variable Rate ☐ Assumed Existing Loan Balance
☐ VA (_____ Discount Points) ☐ 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. WAS AN IMPROVEMENT BOND ASSUMED BY THE BUYER? ☐ 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 ☐ From a family member ☐ Other (please explain): _____
- If purchased through a broker, provide broker's name and phone number: _____
- Please explain any special terms, seller concessions, or financing and any other information that would help the Assessor understand the purchase price and terms of sale. _____

PART IV: PROPERTY INFORMATION

- A. TYPE OF PROPERTY TRANSFERRED:
- ☐ Single – family residence ☐ Agricultural ☐ Timeshare
☐ Multiple – family residence (no. of units: _____) ☐ Co-op/Own-your-own ☐ Manufactured Home
☐ Commercial/Industrial ☐ Condominium ☐ Unimproved Lot
☐ Other (Description: i.e., timber, mineral, water rights, etc.) _____
- B. IS THIS PROPERTY INTENDED AS YOUR PRINCIPAL RESIDENCE? ☐ Yes ☐ No
- If **yes**, enter date of occupancy _____ / _____ / 20____ or intended occupancy _____ / _____ / 20____.
- (month) (day) (year) (month) (day) (year)
- C. IS PERSONAL PROPERTY INCLUDED IN THE PURCHASE PRICE (i.e., furniture, farm equipment, machinery, etc.)?
(other than a manufactured home 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)
- D. IS A MANUFACTURED HOME INCLUDED IN THE PURCHASE PRICE? ☐ Yes ☐ No
- If **yes**, how much of the purchase price is allocated to the manufactured home? \$ _____
- Is the manufactured home subject to local property tax? ☐ Yes ☐ No What is the Decal Number? _____
- E. DOES THE PROPERTY PRODUCE INCOME? ☐ Yes ☐ No If **yes**, is the income from:
- ☐ Lease/Rent ☐ Contract ☐ Mineral Rights ☐ Other (please explain): _____
- F. WHAT WAS THE CONDITION OF THE PROPERTY AT THE TIME OF SALE?
- ☐ Good ☐ Average ☐ Fair ☐ Poor

Please explain the physical condition of the property and provide any other information (such as restrictions, etc.) that would assist the Assessor in determining the value of the property: _____

CERTIFICATION

OWNERSHIP TYPE (✓)

- Proprietorship ☐
Partnership ☐
Corporation ☐
Other _____ ☐

*I certify that the foregoing is true, correct and complete to the best of my knowledge and belief.
This declaration is binding on each and every co-owner and/or partner.*

NAME OF NEW OWNER/CORPORATE OFFICER

TITLE

SIGNATURE OF NEW OWNER/CORPORATE OFFICER

DATE

NAME OF ENTITY (typed or printed)

FEDERAL EMPLOYER ID NUMBER

ADDRESS (typed or printed)

E-MAIL ADDRESS (optional)

DATE

(NOTE: The Assessor may contact you for additional 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).