



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

FOR RECORDER'S USE ONLY

**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.) ( ) \_\_\_\_\_

NV-O	NV-T	CSH	PP	AREA
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**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 write Assessor's Parcel Number (s): \_\_\_\_\_  
 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 <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Other _____ <input type="checkbox"/>	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.
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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).**