# CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN PARENT AND CHILD



James B Rooney Assessor of Amador County 810 Court Street Jackson, CA 95642 PH: (209) 223-6351 FAX: (209) 223-6721

States Code, section 405(c)(2)(C)(i) which authorizes the use of social security numbers for identification purposes in the administration of any tax.] A foreign national who cannot obtain a social security number may provide a tax identification number issued by the Internal Revenue Service. The numbers are used by the Assessor and the state to monitor the exclusion limit.  B. TRANSFEROR(S)(SELLER(S) (additional transferors please complete Section D on the reverse)  1. Print full name(s) of transferor(s)  2. Social security number(s)  3. Family relationship(s) to transferee(s)  If adopted, age at time of adoption  4. Was this property the transferor's principal residence?  4. Was this property the transferor's principal residence?  5. Have there been other transfers that qualified for this exclusion?  5. Have there been other transfers that qualified for this exclusion?  6. Was only a partial interest in the property transferre?  7. Was this property owned in joint tenancy?  7. Was the property owned in joint tenancy?  7. Was this property owned in joint tenancy?	NAME AND MAILING ADDRESS (Make necessary corrections to the printed name and mailing address.)						
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If adopted, age at time of adoption	2. Social security number(s)						
4. Was this property the transferor's principal residence?       Yes       No         If yes, please check which of the following exemptions was granted or was eligible to be granted on this property:       Homeowners' Exemption         5. Have there been other transfers that qualified for this exclusion?       Yes       No         If yes, please attach a list of all previous transfers that qualified for this exclusion. (This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)         6. Was only a partial interest in the property transferred?       Yes       No         IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.       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 that I am the parent or child (or transfero's lega representative) of the transfer Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER       QL	<ol><li>Family relationship(s) to transferee(s)</li></ol>						
If yes, please check which of the following exemptions was granted or was eligible to be granted on this property:          Homeowners' Exemption       Disabled Veterans' Exemption         5. Have there been other transfers that qualified for this exclusion?       Yes       No         If yes, please attach a list of all previous transfers that qualified for this exclusion. (This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)         6. Was only a partial interest in the property transferred?       Yes       No         IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.       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 that I am the parent or child (or transferor's lega representative) of the transferes listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER       DATE	If adopted, age at time of adoption						
□ Homeowners' Exemption       □ Disabled Veterans' Exemption         5. Have there been other transfers that qualified for this exclusion?       □ Yes       □ No         If yes, please attach a list of all previous transfers that qualified for this exclusion. (This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)         6. Was only a partial interest in the property transferred?       □ Yes       □ No       If yes, percentage transferred       %         7. Was this property owned in joint tenancy?       □ Yes       □ No       ImpORTANT:       If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.         CERTIFICATION       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 that I am the parent or child (or transferor's lega representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DATE       DATE       DATE <td>4. Was this property the transferor's principal r</td> <td>esidence? 🗌 Yes 🗌 No</td> <td></td>	4. Was this property the transferor's principal r	esidence? 🗌 Yes 🗌 No					
<ul> <li>5. Have there been other transfers that qualified for this exclusion?   Yes   No</li> <li>If yes, please attach a list of all previous transfers that qualified for this exclusion. (This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)</li> <li>6. Was only a partial interest in the property transferred?   Yes   No   If yes, percentage transferred%</li> <li>7. Was this property owned in joint tenancy?   Yes   No</li> <li>IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.</li> <li>CERTIFICATION</li> <li>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 that I am the parent or child (or transferor's lega representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.</li> <li>SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE PRINTED NAME</li> <li>MAILING ADDRESS</li> <li>DAYTIME PHONE NUMBER</li> <li>()</li> </ul>	If <b>yes,</b> please check which of the following e	exemptions was granted or was eligible to be	granted on this property:				
If yes, please attach a list of all previous transfers that qualified for this exclusion. (This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)  6. Was only a partial interest in the property transferred?   Yes   No   If yes, percentage transferred%  7. Was this property owned in joint tenancy?   Yes   No IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.  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 that I am the parent or child (or transferor's lega representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.  SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE PRINTED NAME  MAILING ADDRESS DAYTIME PHONE NUMBER ()	$\Box$ Homeowners' Exemption $\Box$ Disabled V	eterans' Exemption					
Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.)  6. Was only a partial interest in the property transferred?  Yes No If <b>yes</b> , percentage transferred%  7. Was this property owned in joint tenancy?  Yes No <u>IMPORTANT</u> : If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments. <u>CERTIFICATION</u> 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 that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.  SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE PRINTED NAME MAILING ADDRESS DAYTIME PHONE NUMBER ()	5. Have there been other transfers that qualifie	ed for this exclusion? $\Box$ Yes $\Box$ No					
7. Was this property owned in joint tenancy?       Yes       No         IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.         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 that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER       ()	Assessor's parcel number, address, date o						
IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.         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 that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER       ()	6. Was only a partial interest in the property tra	ansferred?	age transferred %				
Or trust and all amendments.         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 that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE         PRINTED NAME       DATE         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME         DATE       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER	7. Was this property owned in joint tenancy?	🗆 Yes 🔲 No					
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 that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE       PRINTED NAME       DATE         MAILING ADDRESS       DAYTIME PHONE NUMBER       ()		nedium of a will and/or trust, you must at	tach a full and complete copy of the will and/				
accompanying statements or documents, is true and correct to the best of my knowledge and that I am the parent or child (or transferor's legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5. SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE PRINTED NAME DATE SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE PRINTED NAME DATE MAILING ADDRESS DAYLOW DATE	l and for (an algorithm) and an angular of a string and		for a sector of all information how any inclusion and				
Image: Signature of transferor or legal representative     PRINTED NAME     Date       Imailing ADDress     DayTime phone number     ()	accompanying statements or documents, is true a	and correct to the best of my knowledge and	d that I am the parent or child (or transferor's legal				
Image: Signature of transferor or legal representative     PRINTED NAME     Date       Imailing ADDress     DayTime phone number     ()	of my principal residence under Revenue and Taxa	ation Code section 69.5.					
MAILING ADDRESS DAYTIME PHONE NUMBER ()		PRINTED NAME	DATE				
( )	SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	PRINTED NAME	DATE				
( )							
CITY, STATE, ZIP EMAIL ADDRESS	MAILING ADDRESS	1	DAYTIME PHONE NUMBER				
CITY, STATE, ZIP			( )				
	CITY, STATE, ZIP		EMAIL ADDRESS				
(Please complete applicable information on reverse side.)	(Please	complete applicable information on rever	se side.)				

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION

# C. TRANSFEREE(S)/BUYER(S) (additional transferees please complete Section E below) 1. Print full name(s) of transferee(s) \_ 2. Family relationship(s) to transferor(s) \_\_\_\_ If adopted, age at time of adoption \_ If stepparent/stepchild relationship is involved, was parent still married to or in a registered domestic partnership (registered means registered with the California Secretary of State) with stepparent on the date of purchase or transfer? □ Death □ Divorce/Termination of partnership If **no**, was the marriage or registered domestic partnership terminated by: If terminated by death, had the surviving stepparent remarried or entered into a registered domestic partnership as of the date of purchase or transfer? 🗌 Yes 🗌 No If in-law relationship is involved, was the child-in-law still married to or in a registered domestic partnership with the child on the date of purchase or transfer? $\Box$ Yes $\Box$ No If **no**, was the marriage or registered domestic partnership terminated by: 🗌 Death 🗌 Divorce/Termination of partnership If terminated by death, had the surviving child-in-law remarried or entered into a registered domestic partnership as of the date of purchase or transfer? Yes No

3. ALLOCATION OF EXCLUSION (If the full cash value of the real property transferred exceeds the one million dollar value exclusion, the transferee must specify on an attachment to this claim the amount and allocation of the exclusion that is being sought.)

### 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 that I am the parent or child (or transferee's legal representative) of the transferors listed in Section B; and that all of the transferees are eligible transferees within the meaning of section 63.1 of the Revenue and Taxation Code.

SIGNATURE OF TRANSFEREE OR LEGAL REPRESENTATIVE	PRINTED NAME	DATE
MAILING ADDRESS		DAYTIME PHONE NUMBER
CITY, STATE, ZIP		EMAIL ADDRESS

Note: The Assessor may contact you for additional information.

#### D. ADDITIONAL TRANSFEROR(S)/SELLER(S)

NAME	SOCIAL SECURITY NUMBER	SIGNATURE	RELATIONSHIP

## E. ADDITIONAL TRANSFEREE(S)/BUYER(S)

NAME	RELATIONSHIP



### CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN PARENT AND CHILD

Revenue and Taxation Code, Section 63.1

**IMPORTANT:** In order to qualify for this exclusion, a claim form must be completed and signed by the transferors and a transferee and filed with the Assessor. A claim form is timely filed if it is filed within three years after the date of purchase or transfer, or prior to the transfer of the real property to a third party, whichever is earlier. If a claim form has not been filed by the date specified in the preceding sentence, it will be timely if filed within six months after the date of mailing of a notice of supplemental or escape assessment for this property. If a claim is not timely filed, the exclusion will be granted beginning with the calendar year in which you file your claim. Complete all of Sections A, B, and C and answer each question or your claim may be denied. Proof of eligibility, including a copy of the transfer document, trust, or will, may be required. In situations where all information is not known by the due date, the parties should file this claim with as much information as possible, and later amend the claim with any revised information. *Please note*:

- 1. This exclusion only applies to transfers that occur on or after November 6, 1986 and on or before February 15, 2021.
- 2. In order to qualify, the real property must be transferred from parents to their children or children to their parents.
- 3. If you do not complete and return this form, it may result in this property being reassessed.
- 4. Revenue and Taxation Code section 63.1 provides, with certain limitations, that a "change in ownership" does not include the purchase or transfer of:
  - · The principal residence between parents and children, and/or
  - The first \$1,000,000 of the factored base year value of other real property between parents and children.

**NOTE:** Effective January 1, 2009, Revenue and Taxation Code section 63.1(j) allows a county board of supervisors to authorize a onetime processing fee of not more than \$175 to recover costs incurred by the County Assessor due to the failure of an eligible transferee to file a claim for the parent-child change in ownership exclusion after two written requests have been sent to an eligible transferee by the County Assessor.

# For transfers occurring on or after February 16, 2021, please file form BOE-19-P, Claim for Reassessment Exclusion for Transfer Between Parent and Child Occurring on or After February 16, 2021.

