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CHANGE IN OWNERSHIP STATEMENT
DEATH OF REAL PROPERTY OWNER

This notice is a request for a completed Change in Ownership Statement. Failure to file this statement will result in the assessment of a penalty.

NAME AND MAILING ADDRESS

(Make necessary corrections to the printed name and mailing address)

Section 480(b) of the Revenue and Taxation Code requires that the personal representative file this statement with the Assessor in each county where the decedent owned property at the time of death. **File a separate statement for each parcel of real property owned by the decedent.**

NAME OF DECEDENT

DATE OF DEATH

☐ YES ☐ NO

Did the decedent have an interest in real property in this county? If **YES**, answer all questions. If **NO**, sign and complete the certification on page 2.

STREET ADDRESS OF REAL PROPERTY

CITY

ZIP CODE

ASSESSOR'S PARCEL NUMBER (APN)*

*If more than 1 parcel, attach separate sheet.

DESCRIPTIVE INFORMATION ☒ (IF APN UNKNOWN)

- ☐ Copy of deed by which decedent acquired title is attached.
- ☐ Copy of decedent's most recent tax bill is attached.
- ☐ Deed or tax bill is not available; legal description is attached.

DISPOSITION OF REAL PROPERTY ☒

- ☐ Succession without a will
- ☐ Probate Code 13650 distribution
- ☐ Affidavit
- ☐ Decree of distribution pursuant to will
- ☐ Action of trustee pursuant to terms of a trust

TRANSFER INFORMATION ☒ Check all that apply and list details below.

- ☐ Decedent's spouse ☐ Decedent's registered domestic partner
- ☐ Decedent's child(ren) or parent(s). If qualified for exclusion from reassessment, a *Claim for Reassessment Exclusion for Transfer Between Parent and Child* must be filed (see instructions). Was this the decedent's principal residence? ☐ YES ☐ NO
- ☐ Decedent's grandchild(ren). If qualified for exclusion from reassessment, a *Claim for Reassessment Exclusion for Transfer Between Grandparent and Grandchild* must be filed (see instructions). Was this the decedent's principal residence? ☐ YES ☐ NO
- ☐ Cotenant to cotenant. If qualified for exclusion from reassessment, an *Affidavit of Cotenant Residency* must be filed (see instructions).
- ☐ Other beneficiaries or heirs.
- ☐ A trust.

NAME OF TRUSTEE

ADDRESS OF TRUSTEE

List names and percentage of ownership of all beneficiaries or heirs:

NAME OF BENEFICIARY OR HEIRS	RELATIONSHIP TO DECEDENT	PERCENT OF OWNERSHIP RECEIVED

- ☐ This property has been or will be sold prior to distribution. (Attach the conveyance document and/or court order).

NOTE: Sale of the property does not relieve the need to file a *Claim for Reassessment Exclusion for Transfer Between Parent and Child* if appropriate.

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION



