

**CLAIM FOR REASSESSMENT EXCLUSION FOR
TRANSFER BETWEEN GRANDPARENT AND GRANDCHILD
OCCURRING ON OR AFTER FEBRUARY 16, 2021**

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)

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Claude Parrish
Orange County Assessor
500 S. Main Street, First Floor, Suite 103
Orange, CA 92868-4512
or
P. O. Box 22000
Santa Ana, CA 92702-2000
(714) 834-2746
www.ocassessor.gov

A. PROPERTY

ASSESSOR'S PARCEL/ID NUMBER

PROPERTY ADDRESS

CITY

DATE OF PURCHASE OR TRANSFER

RECORDER'S DOCUMENT NUMBER

DATE OF DEATH *(if applicable)*

PROBATE NUMBER *(if applicable)*

DATE OF DECREE OF DISTRIBUTION *(if applicable)*

B. TRANSFEROR(S)/SELLER(S) *(additional transferors, please complete Section D on the reverse)*

Print full name(s) of transferor(s)

Name

Name

Family relationship(s) to transferee(s)

Relationship

Relationship

- 1. Was this property the transferor's family farm? Yes No
- 2. Was this property the transferor's principal residence? Yes No
If **yes**, please check which one of the following exemptions was granted or was eligible to be granted on this property:
 Homeowners' Exemption Disabled Veterans' Exemption
- 3. Was only a partial interest in the property transferred? Yes No If yes, percentage transferred _____%.
- 4. Was this property owned in joint tenancy? Yes No
- 5. Print name(s) of child(ren) of grandparents who is(are) the parent(s) of grandchild:

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 grandparent or grandchild (or transferor's legal representative) of the transferees listed in Section C.

SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE

PRINTED NAME

DATE

SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE

PRINTED NAME

DATE

MAILING ADDRESS

DAYTIME PHONE NUMBER

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CITY, STATE, ZIP

EMAIL ADDRESS

(Please complete information on reverse side)

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION



C. TRANSFEREE(S)/BUYER(S) (additional transferees please complete Section E below)

Print full name(s) of transferee(s)	Name	Name
Family relationship(s) to transferor(s)	Relationship	Relationship

- If grandchild was adopted, age at time of adoption: _____ Adopted by whom? _____
- Parent: Name of direct descendant of grandparent who is the parent of the grandchild: _____
 Date of death of direct descendant _____ (please provide death certificate)
 - Was deceased parent married or in a registered domestic partnership ("registered" means registered with the California Secretary of State) as of the date of death? Yes No
 - Is the spouse or registered domestic partner of the deceased parent a: (check one):
 Parent of the grandchild Stepparent of the grandchild (a stepparent need not be deceased)
 - Had surviving spouse/partner remarried or entered into a registered domestic partnership? Yes No
 If **YES**, date of marriage or registration of the domestic partnership must have occurred prior to the date of purchase or transfer to qualify for exclusion. Date of marriage/domestic partnership registration: _____
 If **NO**, surviving spouse/partner is still considered a child of grandparents and must also be deceased prior to the purchase or transfer to qualify for exclusion. Date of death _____ (Please provide death certificate)
- Is this property continuing to be used as the family farm by the transferee? Yes No
- Is this property going to be the transferee's principal residence? Yes No
 If yes, please check which of the following exemptions for which a claim was filed and complete a, b, and c below. (Please note that the transferee must file for one of these exemptions within one year of the date of transfer.)
 Homeowners' Exemption Disabled Veterans' Exemption Date Filed _____
 - Name of transferee who filed exemption claim: _____
 - Date the transferee occupied this property as a principal residence: _____ (month/day/year)
 - Does the transferee own another property that is or was their principal residence in California? Yes No
 If yes, please provide the address below and the move out date.

ADDRESS	COUNTY	ASSESSOR'S PARCEL/ID NUMBER
CITY, STATE, ZIP		MOVE-OUT-DATE (month/date/year)

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 grandparent or grandchild (or transferee's legal representative) of the transferors listed in Section B.

SIGNATURE OF TRANSFEREE OR LEGAL REPRESENTATIVE ▶	PRINTED NAME	DATE
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)

PRINT NAME	RELATIONSHIP TO TRANSFEREE

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

PRINT NAME	RELATIONSHIP TO TRANSFEROR



**CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN GRANDPARENT AND GRANDCHILD
OCCURRING ON OR AFTER FEBRUARY 16, 2021**

For transfers occurring on or after February 16, 2021, section 2.1(c) of article XIII A of the California Constitution provides that the terms "purchase" or "change in ownership" do not include the purchase or transfer of a family home between grandparents and their grandchildren, as long as the property was the family home of the transferor and continues as the family home of the transferee. A family home also includes a family farm.

To qualify for this exclusion, all parents of the grandchild, who qualify as children of the grandparents, must be deceased as of the date of the grandparent-grandchild transfer. A stepparent does not need to be deceased.

For a family home, the transferee is required to file for the homeowners' or disabled veterans' exemption within one year of the date of transfer.

If the assessed value of the family home on the date of transfer *exceeds* the sum of the factored base year value plus \$1 million, the amount in excess of this sum will be added to the factored base year value.

This claim form is for transfers occurring on or after February 16, 2021.

For transfers occurring on or before February 15, 2021, please file claim form BOE-58-G, *Claim for Reassessment Exclusion for Transfer from Grandparent to Grandchild*.

NOTE: A county board of supervisors may authorize one-time 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 grandparent-grandchild change in ownership exclusion after two written requests have been sent to an eligible transferee by the county assessor.

