EF-58-AH-R19-0519-39002243-1 BOE-58-AH (P1) REV. 19 (05-19)

CLAIM FOR REASSESSMENT EXCLUSION FOR TRANSFER BETWEEN PARENT AND CHILD



Steve J. Bestolarides Assessor-Recorder-County Clerk

San Joaquin County 44 N San Joaquin Street Suite 230 Stockton, CA 95202-3273 Telephone: (209) 468-2630 https://www.sjgov.org/department/assessor

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

I	I							
A. PROPERTY								
ASSESSOR'S PARCEL NUMBER								
		Tame:						
PROPERTY ADDRESS	CITY							
RECORDER'S DOCUMENT NUMBER	DATE OF PURCHASE OR TRANSFER							
PROBATE NUMBER (if applicable)	DATE OF DEATH (if applicable)	DATE OF DECREE OF DISTRIBUTION (if applicable)						
States Code, section 405(c)(2)(C)(i) which authorized	orizes the use of social security ocial security number may prov and the state to monitor the excl							
	ansierors piease complete sec	ion 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							
		you aligible to be granted on this property.						
		as eligible to be granted on this property:						
·	☐ Homeowners' Exemption ☐ Disabled Veterans' Exemption							
5. Have there been other transfers that qualified for this exclusion?								
		ansferees/buyers, and family relationship. Transferor's principal						
6. Was only a partial interest in the propert	6. Was only a partial interest in the property transferred? Yes No If yes, percentage transferred %							
7. Was this property owned in joint tenancy	7. Was this property owned in joint tenancy? Yes No							
$\underline{\text{IMPORTANT}}\!\!:$ If the transfer was through the trust and all amendments.	medium of a will and/or trust,	you must attach a full and complete copy of the will and/or						
	CERTIFICATION							
accompanying statements or documents, is true	and correct to the best of my land correct to the best of my land continuity and granting this xation Code section 69.5.	ornia that the foregoing and all information hereon, including any nowledge and that I am the parent or child (or transferor's legal exclusion and will not file a claim to transfer the base year value						
SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	PRINTED NAME	DATE						
>								
MAILING ADDRESS	DAYTIME PHONE NUMBER							
CITY, STATE, ZIP	() EMAIL ADDRESS							
511 1, 5 11 AL, 411	LIMAL ADDITECT							

(Please complete applicable information on reverse side.)

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION



C. TI	RANSFEREE(S)/BUYER(S) (additional tra	nsferees please compl	lete Section E below)						
1.	Print full name(s) of transfe	eree(s)								
2.	Family relationship(s) to transferor(s)									
	If adopted, age at time of a									
	If stepparent/stepchild relationship is involved, was parent still married to or in a registered domestic partnership (registered mearegistered with the California Secretary of State) with stepparent on the date of purchase or transfer? \Box Yes \Box No									
	If no , was the marriage or registered domestic partnership terminated by: \Box Death \Box Divorce/Termination of partnership									
	If terminated by death, had the surviving stepparent remarried or entered into a registered domestic partnership as of the date of purchas or transfer? \square Yes \square No									
	If in-law relationship is involved, was the son-in-law or daughter-in-law still married to or in a registered domestic partnership with the daughter or son on the date of purchase or transfer? \Box Yes \Box No									
If no , was the marriage or registered domestic partnership terminated by: \Box Death \Box Divorce/Termination of partnership										
	If terminated by death, had the surviving son-in-law or daughter-in-law remarried or entered into a registered domestic partnership as of the date of purchase or transfer? \Box Yes \Box 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.)									
			CERTIFI	CATION						
accom repres the Re	panying statements or docu	ments, is true sted in Section	and correct to the best	of my knowledge an	d that I am the par	nformation hereon, including any ent or child (or transferee's lega n the meaning of section 63.1 o				
<u> </u>										
MAILING	ADDRESS				DAYTIME PHONE NUME	BER				
CITY, STATE, ZIP EMAIL ADDRESS										
Note:	The Assessor may contact y	ou for addition	al information.		1					
		D. ADD	ITIONAL TRANSFERO	PR(S)/SELLER(S)						
NAME		SOCIAL	SECURITY NUMBER	SIGNATURE		RELATIONSHIP				
		F 405	NITIONAL TRANSFER	FF(0) (BUNEB(0)						
		E. ADL	DITIONAL TRANSFER	EE(S)/BUYER(S)						
NAME						RELATIONSHIP				



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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 informtion. **Please note**:

- 1. This exclusion only applies to transfers that occur on or after November 6, 1986.
- 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. California law 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 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 parent-child change in ownership exclusion after two written requests have been sent to an eligible transferee by the county assessor.



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