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F       Section 480(b) of the Revenue and Taxation Code requires the be personal representative file the Assess in each courty where the decedent owned property at the time death. File a separate statement for each parcel of real proper owned by the decedent.         L	Section 480(b) of the Revenue and Taxation Code require the personal representative (Bith Bits astament with the Ast in each county where the decedent owned property at the indexth. File a separate statement for each parcel of real pro- owned by the decedent.         Image: OF DECEDENT       Image: OF DECEDENT         Imanse: Decedent's spinatin and Child must be filed (see instruction	notice is a request for a completed Change in rship Statement. Failure to file this statement will in the assessment of a penalty. NAME AND MAILING ADDRESS	ALFORNIA ALFORNIA	Τe	elephone: (707	7) 565-1888
the personal representative file the decedent owned property at the time death. File a separate statement for each parcel of real proper owned by the decedent.   L   INDE OF DECEDENT   Date OF DECEDENT   On the decedent have an interest in real property in this country? If YES, answer all questions. If NO, sign and complete the certification on page 2.   STREET ADDRESS OF REAL PROCENT   OF DECRIPTIVE INFORMATION (IF APN UNKOVOW)   DESCRIPTIVE INFORMATION (IF APN UNKOVOW)   DESCRIPTIVE INFORMATION (IF APN UNKOVOW)   DESPOSITION OF REAL PROCENTY   Succession without a will   Decoded by which decedent acquired title is attached.   Copy of deed by which decedent acquired title is attached.   Decodent is not available; legal description is attached.   Decodent's spouse   Decodent's replayed and that apply and list details below.   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 replayed 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 replayed 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 replayed of all beneficiaries or heirs:   Must or Busineer   Decedent's replayed or heart is a definition or passess or reusers   List names and percentage of ownership of all beneficiaries or heirs:   Must or Busineer   Add	the personal representative file is statement with the Ass in each courty where the decodent owned property at the 1 death. File a separate statement for each parcel of real pro- owned by the decodent.   Image: Im					
NAME OF DECEDENT       DATE OF DECHT            PTES DAD        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       OTY       ZP CODE       ASSESSOR'S PARCEL NUMBER (APN)*            DESCRIPTIVE INFORMATION	NAME OF DECEDENT       DATE OF DECIDENT         Image: Provide the certification on page 2.       Disting the decedent have an interest in real property in this county? If YES, answer all questions. If NO, sign an complete the certification on page 2.         STREET ADDRESS OF REAL PROPERTY       OTY       ZP CODE       ASSESSOR'S PARCEL NUMBER (APN)*         Copy of deed by which decedent acquired title is attached.       DisPOSITION OF REAL PROPERTY       Decree of distribution         Decodent's most recent tax bill is attached.       Probate Code 13650 distribution       Action of trustee pur to terms of a trust         TRANSFER/PROPERTY INFORMATION       Check all that apply and list details below.       Decedent's registered domestic partner         Decedent's spouse       Decedent's registered domestic partner       Decedent's principal residence?       YES_NO         Was this the decedent's principal residence?       YES_NO       NO       Is this property a family farm?       YES_NO         Decedent's grandchild(ren). If qualified for exclusion from reassessment, a Claim for Reassessment Exclusion for Transfer Between Parent and Crindchild must be filed (see instructions).       Was this the decedent's principal residence?       YES_NO         Cotenant to cotenant. If qualified for exclusion from reassessment, a Claim for Cotenant Residency must be filed (see instructions).       Was this the decedent's principal residence?       YES_NO         Cotenant to cotenant. If qualified for exclusion from reassessment, a Affidavit			the personal repr in each county wh death. <b>File a sepa</b>	esentative file nere the deceo rate statemer	this statement with the Assess dent owned property at the time
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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   Is 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   List names and percentage of ownership of all beneficiaries or heirs:   Is name of BENEFICIARY OR HEIRS   RELATIONSHIP TO DECEDENT   PERCENT OF OWNERSHIP RECEIVED   In 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.	□ Decedent's spouse       □ Decedent's registered domestic partner         □ Decedent's child(ren) or parent(s). If qualified for exclusion from reassessment, a <i>Claim for Reassessment Exclusion for Transfer Between Parent and Child</i> must be filed (see instructions).         Was this the decedent's principal residence?       YES NO       Is this property a family farm?       YES NO         □ Decedent's grandchild(ren). If qualified for exclusion from reassessment, a <i>Claim for Reassessment Exclusion for Transfer Between Grandparent and Grandchild</i> must be filed (see instructions).       Was this the decedent's principal residence?       YES NO       Is this property a family farm?       YES NO         □ Cotenant to cotenant. If qualified for exclusion from reassessment, an <i>Affidavit of Cotenant Residency</i> must be filed (see instructions).       Other beneficiaries or heirs.         □ A trust.	Deed or tax bill is not available; legal description is a	اttached. 🗌 Affida،	vit		
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			NOT SUBJECT T	O PUBLIC INS	PECTION	

EF-502-D-R14-0523-49001693-2

BOE-502-D (P2) REV. 14 (05-22)

YES

NAME

NO Will the decree of distribution include distribution of an ownership interest in any legal entity that owns real property in this county? If **YES**, will the distribution result in any person or legal entity obtaining control of more than 50% of the ownership of that legal entity?

NAME AND ADDRESS OF LE	GAL ENTITY		NAME OF PERSON OR ENTITY G	AINING SU	CH CONTROL
YES NO		lent the lessor or lessee in a lease tha <b>S</b> , provide the names and addresses of		ore, incl	uding renewa
NAME		MAILING ADDRESS	CITY	STATE	ZIP CODE

## MAILING ADDRESS FOR FUTURE PROPERTY TAX STATEMENTS

ADDRESS	CITY	S	TATE	ZIP CODE
CERT	FICATION			
l certify (or declare) under penalty of perjury under the laws of correct and complete to the l			ontair	ned herein is true,
	best of my knowledge and be		ontair	ned herein is true,

## INSTRUCTIONS



EMAIL ADDRESS

Failure to file a Change in Ownership Statement within the time prescribed by law may result in a penalty of either \$100 or 10% of the taxes applicable to the new base year value of the real property or manufactured home, whichever is greater, but not to exceed five thousand dollars (\$5,000) if the property is eligible for the homeowners' exemption or twenty thousand dollars (\$20,000) if the property is not eligible for the homeowners' exemption if that failure to file was not willful. This penalty will be added to the assessment roll and shall be collected like any other delinquent property taxes and subjected to the same penalties for nonpayment.

DAYTIME TELEPHONE

Section 480 of the Revenue and Taxation Code states, in part:

- (a) Whenever there occurs any change in ownership of real property or of a manufactured home that is subject to local property taxation and is assessed by the county assessor, the transferee shall file a signed change in ownership statement in the county where the real property or manufactured home is located, as provided for in subdivision (c). In the case of a change in ownership where the transferee is not locally assessed, no change in ownership statement is required.
- (b) The personal representative shall file a change in ownership statement with the county recorder or assessor in each county in which the decedent owned real property at the time of death that is subject to probate proceedings. The statement shall be filed prior to or at the time the inventory and appraisal is filed with the court clerk. In all other cases in which an interest in real property is transferred by reason of death, including a transfer through the medium of a trust, the change in ownership statement or statements shall be filed by the trustee (if the property was held in trust) or the transferee with the county recorder or assessor in each county in which the decedent owned an interest in real property within 150 days after the date of death.

The above requested information is required by law. Please reference the following:

- Passage of Decedent's Property: Beneficial interest passes to the decedent's heirs effectively on the decedent's date of death. However, a document must be recorded to vest title in the heirs. An attorney should be consulted to discuss the specific facts of your situation.
- Change in Ownership: California Code of Regulations, Title 18, Rule 462.260(c), states in part that "[i]nheritance (by will or intestate succession)" shall be "the date of death of decedent."
- Inventory and Appraisal: Probate Code, Section 8800, states in part, "Concurrent with the filing of the inventory and appraisal pursuant to this section, the personal representative shall also file a certification that the requirements of Section 480 of the Revenue and Taxation Code either:

(1) Are not applicable because the decedent owned no real property in California at the time of death

- (2) Have been satisfied by the filing of a change in ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death."
- Parent/Child and Grandparent/Grandchild Exclusions: A claim must be filed within three years after the date of death/transfer, but prior to the date
  of transfer to a third party; or within six months after the date of mailing of a Notice of Assessed Value Change, issued as a result of the transfer of
  property for which the claim is filed. An application may be obtained by contacting the county assessor.
- Cotenant to cotenant. An affidavit must be filed with the county assessor. An affidavit may be obtained by contacting the county assessor. This statement will remain confidential as required by Revenue and Taxation Code Section 481, which states in part: "These statements are not public documents and are not open to inspection, except as provided by Section 408."