EF-502-AH-R18-0221-03001075-1

BOE-502-AH (P1) REV. 18 (02-21)

### **CHANGE OF OWNERSHIP STATEMENT**

This statement represents a written request from the Assessor. Failure to file will result in the assessment of a penalty.



# James B Rooney **Assessor of Amador County**

810 Court Street Jackson, CA 95642 PH: (209) 223-6351 FAX: (209) 223-6721

MAKE AND MALINEADDRESS     Make reversely conditions in the printed name and mailing address)	ILE THIS STATEMENT BY:						
STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY  YES NO This property is intended as my principal residence. If YES, please indicate the date of occupancy or intended occupancy.  YES NO This property is intended as my principal residence. If YES, please indicate the date of occupancy or intended occupancy.  YES NO Are you a disabled veteran or a unmarried surviving spouse of a disabled veteran who was compensated at 100% by the Department of Veterans Affairs?  MAL PROPERTY TAX INFORMATION 10 (AMDRESS)  MAL PROPERTY TAX INFORMATION 10 (AMDRESS)  PART 1. TRANSFER INFORMATION Please complete all statements.  YES NO  A. This transfer is solely between spouses (addition or removal of a spouse, death of a spouse, divorce settlement, etc.).  B. This transfer is solely between domestic partners currently registered with the California Secretary of State (addition or remova a partner, death of a partner, termination settlement, etc.).  C. This is a transfer: between parent(s) and child(ren) between grandparent(s) and grandchild(ren).  Was this the transferor/sprantor's principal residence? YES NO  D. This transaction is to replace a principal residence owned by a person 55 years of age or older.  Within the same county? YES NO  This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for whe the Governor proclaimed a state of emergency. Within the same county? YES NO  This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for whe the Governor proclaimed a state of emergency. Within the same county? YES NO  This transaction is one yo correction of the name(s) of the person(s) holding title to the property (e.g., a name change upon marriage if YES, please explain:  This is a transfer of property.  This is a transfer of execut		٦					
STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY     YES	·	•					
STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY    YES			BUYER'S DAYTIME TELEPHONE NUMBER				
YES	L		BUYER'S EMAIL ADDRESS				
YES	STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY						
YES							
MAL PROPERTY TAX INFORMATION TO (NAME)  MALL PROPERTY TAX INFORMATION TO (NAME)  MALL PROPERTY TAX INFORMATION TO (NAME)  MALL PROPERTY TAX INFORMATION TO (NAME)  Please complete all statements. This section contains possible exclusions from reassessment for certain types of transfers.  YES NO  A. This transfer is solely between spouses (addition or removal of a spouse, death of a spouse, divorce settlement, etc.).  B. This transfer is solely between domestic partners currently registered with the California Secretary of State (addition or removal a partner, death of a partner, termination settlement, etc.).  VES NO  1. C. This is a transfer: between parent(s) and child(ren) between grandparent(s) and grandchild(ren).  Was this the transferor/grantor's principal residence? YES NO  1. D. This transfer is the result of a cotenant's death. Date of death  1. E. This transaction is to replace a principal residence owned by a person 55 years of age or older.  Within the same county? YES NO  1. F. This transaction is to replace a principal residence by a person who is severely disabled.  Within the same county? YES NO  2. G. This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for when the Governor proclaimed a state of emergency. Within the same county? YES NO  3. H. This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for when the Governor proclaimed a state of emergency. Within the same county? YES NO  3. This transaction is only a correction of the name(s) of the person(s) holding title to the property (e.g., a name change upon marriage if YES, please explain:  3. The recorded document substitutes a trustee of a trust, mortgage, or other similar document.  4. This is a transfer of property:  3. This transaction is recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security inter (e.g., cosigner). If YES, please explain:  4. This is a tra	or intended occupancy.			МО	DAY	YEAR	
MAIL PROPERTY TAX INFORMATION TO (ADDRESS)			a disabled veteran who was				
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			s of the transferor(s) and transferee(	s) in ea	ach and	every parcel	
	O. This is a transfer subject to subsidized low-income hous imposed by specified nonprofit corporations.	ing requi	rements with governmentally impose	ed restr	ictions,	or restrictions	
P. This transfer is to the first purchaser of a new building containing an active solar energy system.	P. This transfer is to the first purchaser of a new building c	ontaining	an active solar energy system.				
* Q. Other. This transfer is to  * Please refer to the instructions for Part 1.				-			

THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION



## PART 2. OTHER TRANSFER INFORMATION

Check and complete as applicable.

A. Date of transfer, if other than recording date:						
B. Type of transfer:						
Purchase Foreclosure Gift Trade or exchange I	Merger, stock, or partnership acquisition	on (Form BOE-100-B)				
Contract of sale. Date of contract:	Inheritance. Date o	f death:				
Sale/leaseback Creation of a lease Assignment of a lease	_					
Original term in years (including written options):  Other. Please explain:	Remaining term in years (incit					
C. Only a partial interest in the property was transferred. YES NO	If YES, indicate the percentage trans	sferred:%				
PART 3. PURCHASE PRICE AND TERMS OF SALE	Check and complete as applicable	le				
A. Total purchase price		\$				
B. Cash down payment or value of trade or exchange excluding closing costs	, i	Amount \$				
C. First deed of trust @% interest for years. Monthly paym	ent \$	Amount \$				
FHA (Discount Points)	Fixed rate Variable rate					
Bank/Savings & Loan/Credit Union Loan carried by seller						
Balloon payment \$ Due date:						
D. Second deed of trust @ % interest for years. Monthly paym	ent\$	Amount \$				
Fixed rate Variable rate Bank/Savings & Loan/Credit Unio		,				
Balloon payment \$ Due date:						
		-l				
E. Was an Improvement Bond or other public financing assumed by the buyer		alance \$				
F. Amount, if any, of real estate commission fees paid by the buyer which are		\$				
G. The property was purchased: Through real estate broker. Broker name	Phone nur	nber: ()				
Direct from seller From a family member-Relationship						
Other. Please explain:						
H. Please explain any special terms, seller concessions, broker/agent fees wai	-	ion (e.g., buyer assumed the				
existing loan balance) that would assist the Assessor in the valuation of you	ır property.					
PART 4. PROPERTY INFORMATION	Check and complete as applicable	e.				
A. Type of property transferred	mon and comprete ac approach	<b>.</b>				
	o-op/Own-your-own	Manufactured home				
	Condominium	Unimproved lot				
	imeshare	Commercial/Industrial				
Other. Description. (i.e., timber, militeral, water rights, etc.)	meshare	Commercial/industrial				
P NEC NO Describe and the second seco						
B. YES NO Personal/business property, or incentives, provided by seller to buyer are included in the purchase price. Examples of personal property are furniture, farm equipment, machinery, etc. Examples of incentives are club memberships, etc. Attach list if available						
If YES, enter the value of the personal/business property: \$_	Incentives	\$				
C. YES NO A manufactured home is included in the purchase price.		·				
	\$					
YES NO The manufactured home is subject to local property tax. If NO, enter decal number:						
D. YES NO The property produces rental or other income.						
If YES, the income is from: Lease/rent Contract Mineral rights Other:						
E. The condition of the property at the time of sale was: Good Average Fair Poor						
Please describe:						
CERTIFICATI	ON					
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 belief. This declaration is binding on each and						
every buyer/transferee.	DATE	TELEBRIONE				
SIGNATURE OF BUYER/TRANSFEREE OR CORPORATE OFFICER	DATE	TELEPHONE (				
NAME OF BUYER/TRANSFEREE/LEGAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT	) TITLE	EMAIL ADDRESS				

The Assessor's office may contact you for additional information regarding this transaction.



### IMPORTANT NOTICE

The law requires any transferee acquiring an interest in real property or manufactured home subject to local property taxation, and that is assessed by the county assessor, to file a change in ownership statement with the county recorder or assessor. The change in ownership statement must be filed at the time of recording or, if the transfer is not recorded, within 90 days of the date of the change in ownership, except that where the change in ownership has occurred by reason of death the statement shall be filed within 150 days after the date of death or, if the estate is probated, shall be filed at the time the inventory and appraisal is filed. The failure to file a change in ownership statement within 90 days from the date a written request is mailed by the assessor results in a penalty of either: (1) one hundred dollars (\$100), or (2) 10 percent of the taxes applicable to the new base year value reflecting the change in ownership 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 assessor is required to mail the request to file a change in ownership statement to the transferee at the address specified for mailing tax information on either the recorded instrument, the document evidencing a transfer of an interest in real property or manufactured home, or on the filed preliminary change in ownership report, or, if an address is not specified for mailing tax information, to any address reasonably known to the assessor. This penalty will be added to the assessment roll and shall be collected like any other delinquent property taxes, and be subject to the same penalties for nonpayment.

#### ADDITIONAL INFORMATION

NAME AND MAILING ADDRESS OF BUYER: Please make necessary corrections to the printed name and mailing address. Enter Assessor's Parcel Number, name of seller, buyer's daytime telephone number, buyer's email address, and street address or physical location of the real property.

NOTE: Your telephone number and/or email address is <u>very important</u>. If there is a question or a problem, the Assessor needs to be able to contact you.

MAIL PROPERTY TAX INFORMATION TO: Enter the name, address, city, state, and zip code where property tax information should be mailed. This must be a valid mailing address.

PRINCIPAL RESIDENCE: To help you determine your principal residence, consider (1) where you are registered to vote, (2) the home address on your automobile registration, and (3) where you normally return after work. If after considering these criteria you are still uncertain, choose the place at which you have spent the major portion of your time this year. Check YES if the property is intended as your principal residence, and indicate the date of occupancy or intended occupancy.

DISABLED VETERAN: If you checked YES, you may qualify for a property tax exemption. A claim form must be filed and all requirements met in order to obtain the exemption. Please contact the Assessor for a claim form.

#### **PART 1: TRANSFER INFORMATION**

If you check YES to any of these statements, the Assessor may ask for supporting documentation.

- **C,D,E, F, G:** If you checked YES to any of these statements, you may qualify for a property tax reassessment exclusion, which may allow you to maintain your property's previous tax base. **A claim form must be filed and all requirements met in order to obtain any of these exclusions.** Contact the Assessor for claim forms. NOTE: If you give someone money or property during your life, you may be subject to federal gift tax. You make a gift if you give property (including money), the use of property, or the right to receive income from property, without expecting to receive something of at least equal value in return. The transferor (donor) may be required to file Form 709, Federal Gift Tax Return, with the Internal Revenue Service if they make gifts in excess of the annual exclusion amount.
- **H:** Check YES if the reason for recording is to correct a name already on title [e.g., Mary Jones, who acquired title as Mary J. Smith, is granting to Mary Jones]. This is not for use when a name is being removed from title.
- I: Check YES if the change involves a lender, who holds title for security purposes on a loan, and who has no other beneficial interest in the property.
  - "Beneficial interest" is the right to enjoy all the benefits of property ownership. Those benefits include the right to use, sell, mortgage, or lease the property to another. A beneficial interest can be held by the beneficiary of a trust, while legal control of the trust is held by the trustee.
- **J:** A "**cosigner**" is a third party to a mortgage/loan who provides a guarantee that a loan will be repaid. The cosigner signs an agreement with the lender stating that if the borrower fails to repay the loan, the cosigner will assume legal liability for it.
- **N:** This is primarily for use when the transfer is into, out of, or between legal entities such as partnerships, corporations, or limited liability companies. Check YES only if the individuals and the interest held by each remains <u>exactly</u> the same in each and every parcel being transferred.
- **O:** Check YES only if this property is subject to a government or nonprofit affordable housing program that imposes restrictions. Property may qualify for a restricted valuation method (i.e., may result in lower taxes).
- **P:** If you checked YES, you may qualify for a new construction property tax exclusion. **A claim form must be filed and all requirements met in order to obtain the exclusion.** Contact the Assessor for a claim form.

#### PART 2: OTHER TRANSFER INFORMATION

- **A:** The date of recording is rebuttably presumed to be the date of transfer. If you believe the date of transfer was a different date (e.g., the transfer was by an unrecorded contract, or a lease identifies a specific start date), put the date you believe is the correct transfer date. If it is not the date of recording, the Assessor may ask you for supporting documentation.
- **B:** Check the box that corresponds to the type of transfer. If OTHER is checked, please provide a detailed description. Attach a separate sheet if necessary.



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**C:** If this transfer was the result of an inheritance following the death of the property owner, please complete a *Change in Ownership Statement, Death of Real Property Owner,* form BOE-502-D, if not already filed with the Assessor's office.

#### PART 3: PURCHASE PRICE AND TERMS OF SALE

It is important to complete this section completely and accurately. The reported purchase price and terms of sale are important factors in determining the assessed value of the property, which is used to calculate your property tax bill. Your failure to provide any required or requested information may result in an inaccurate assessment of the property and in an overpayment or underpayment of taxes.

- A. Enter the total purchase price, not including closing costs or mortgage insurance.
  - "Mortgage insurance" is insurance protecting a lender against loss from a mortgagor's default, issued by the FHA or a private mortgage insurer.
- B. Enter the amount of the down payment, whether paid in cash or by an exchange. If through an exchange, exclude the closing costs.
  - "Closing costs" are fees and expenses, over and above the price of the property, incurred by the buyer and/or seller, which include title searches, lawyer's fees, survey charges, and document recording fees.
- C. Enter the amount of the First Deed of Trust, if any. Check all the applicable boxes, and complete the information requested.
  - A "balloon payment" is the final installment of a loan to be paid in an amount that is disproportionately larger than the regular installment.
- D. Enter the amount of the Second Deed of Trust, if any. Check all the applicable boxes, and complete the information requested.
- **E.** If there was an assumption of an improvement bond or other public financing with a remaining balance, enter the outstanding balance, and mark the applicable box.
  - An "improvement bond or other public financing" is a lien against real property due to property-specific improvement financing, such as green or solar construction financing, assessment district bonds, Mello-Roos (a form of financing that can be used by cities, counties and special districts to finance major improvements and services within the particular district) or general improvement bonds, etc. Amounts for repayment of contractual assessments are included with the annual property tax bill.
- F. Enter the amount of any real estate commission fees paid by the buyer which are not included in the purchase price.
- **G.** If the property was purchased through a real estate broker, check that box and enter the broker's name and phone number. If the property was purchased directly from the seller (who is not a family member of one of the parties purchasing the property), check the "Direct from seller" box. If the property was purchased directly from a member of your family, or a family member of one of the parties who is purchasing the property, check the "From a family member" box and indicate the relationship of the family member (e.g., father, aunt, cousin, etc.). If the property was purchased by some other means (e.g., over the Internet, at auction, etc.), check the "OTHER" box and provide a detailed description (attach a separate sheet if necessary).
- **H.** Describe any special terms (e.g., seller retains an unrecorded life estate in a portion of the property, etc.), seller concessions (e.g., seller agrees to replace roof, seller agrees to certain interior finish work, etc.), broker/agent fees waived (e.g., fees waived by the broker/agent for either the buyer or seller), financing, buyer paid commissions, and any other information that will assist the Assessor in determining the value of the property.

#### **PART 4: PROPERTY INFORMATION**

- A. Indicate the property type or property right transferred. Property rights may include water, timber, mineral rights, etc.
- **B.** Check YES if personal, business property or incentives are included in the purchase price in Part 3. Examples of personal or business property are furniture, farm equipment, machinery, etc. Examples of incentives are club memberships (golf, health, etc.), ski lift tickets, homeowners' dues, etc. Attach a list of items and their purchase price allocation. An adjustment will not be made if a detailed list is not provided.
- **C.** Check YES if a manufactured home or homes are included in the purchase price. Indicate the purchase price directly attributable to each of the manufactured homes. If the manufactured home is registered through the Department of Motor Vehicles in lieu of being subject to property taxes, check NO and enter the decal number.
- **D.** Check YES if the property was purchased or acquired with the intent to rent or lease it out to generate income, and indicate the source of that anticipated income. Check NO if the property will not generate income, or was purchased with the intent of being owner-occupied.
- **E.** Provide your opinion of the condition of the property at the time of purchase. If the property is in "fair" or "poor" condition, include a brief description of repair needed.

