



PRELIMINARY CHANGE OF OWNERSHIP REPORT

(To be completed by transferee [buyer] prior to transfer of subject property in accordance with Section 480.3 of the Revenue and Taxation Code.)

THIS REPORT IS NOT A PUBLIC DOCUMENT

For Recorders Use Only

For Assessor's Use Only

Con _____

Adj _____

Seller/Transferor:

Buyer/Transferee:

Assessor's Parcel Number(s):

Property Address or Location:

Mail Tax Information To: Name
Address

Phone Number (8 a.m.-5 p.m.):

A Preliminary Change in Ownership Report must be filed with each conveyance in the County Recorder's office for the county where the property is located; this particular form may be used in all 58 counties of California.

NOTICE: A lien for property taxes applies to your property on January 1 of each year for the taxes owing in the following fiscal year, July 1 through June 30. One-half of these taxes is due November 1, and one-half is due February 1. The first installment becomes delinquent on December 10, and the second installment becomes delinquent on April 10. One tax bill is mailed before November 1 to the owner of record. IF THIS TRANSFER OCCURS AFTER JANUARY 1 AND ON OR BEFORE DECEMBER 31, YOU MAY BE RESPONSIBLE FOR THE SECOND INSTALLMENT OF TAXES DUE FEBRUARY 1.

The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the San Bernardino County Assessor. For further information on your supplemental roll obligation, please call the San Bernardino County Assessor at (909) 387-8307.

PART I: TRANSFER INFORMATION

Please answer all questions

YES NO

- A. Is this transfer solely between husband and wife? (Addition of a spouse, death of a spouse, divorce settlement, etc.)
- B. Is this transaction only a correction of the name(s) of the person(s) holding title to the property? (For example, a name change upon marriage?)
- C. Is this document recorded to create, terminate, or reconvey a lender's interest in the property?
- D. Is this transaction recorded only as a requirement for financing purposes or to create, terminate or reconvey a security interest (e.g., cosigner)?
- E. Is this document recorded to substitute a trustee under a deed of trust, mortgage, or other similar document?
- F. Did this transfer result in the creation of a joint tenancy in which the seller (transferor) remains as one of the joint tenants?
- G. Does this transfer return property to the person who created the joint tenancy (original transferor)?
- H. Is this transfer of property:
 - 1. to a trust for the benefit of the Grantor Grantor's spouse
 - a. I am/We are still eligible for the Homeowners Exemption and wish to keep this exemption. Yes No
 - 2. to a trust revocable by the transfer?
 - 3. to a trust from which the property reverts to the grantor within 12 years?
- I. If this property is subject to a lease, is the remaining lease term 35 years or more including written options?
- * J. Is this a transfer between parent(s) and child(ren)? or from grandparent(s) to grandchild(ren)?
- * K. Is this transaction to replace a principal residence by a person 55 years of age or older? Within the same county? Yes No
- * L. Is this transaction to replace a principal residence by a person who is severely disabled as defined by Revenue and Taxation Code section 69.5? Within the same county? Yes No

*If you checked "Yes" to J, K or L, you may qualify for a property tax reassessment exclusion, which may result in lower taxes on your property. Failure to file a claim results in the reassessment of the property.

Please provide any other information that would help the Assessor to understand the nature of the transfer.

IF YOU HAVE ANSWERED "YES" TO ANY OF THE ABOVE QUESTIONS EXCEPT J, K or L PLEASE SIGN AND DATE, OTHERWISE COMPLETE BALANCE OF FORM.

PART II: OTHER TRANSFER INFORMATION

- A. Date of Transfer, if other than recording date _____
- B. Type of transfer. Please check appropriate box.

Purchase	Foreclosure	Gift	Trade or Exchange	Merger, Stock or Partnership Acquisition
Contract of Sale – Date of Contract _____				
Inheritance – Date of Death _____			Other (Please Explain) _____	
Creation of Lease	Assignment of a Lease	Termination of a Lease	Sale/Leaseback	
Date lease began _____				
Original term in years (including written options) _____				
Remaining term in years (including written options) _____				
- C. Was only a partial interest in the property transferred? Yes No

If "Yes", indicate the percentage transferred _____ %

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Please answer, to the best of your knowledge, all applicable questions, sign and date. If a question does not apply, indicate with "N/A".

PART III: PURCHASE PRICE AND TERMS OF SALE

A. CASH DOWN PAYMENT OR Value of Trade or Exchange (excluding closing costs) Amount \$ _____

B. FIRST DEED OF TRUST @ _____ % interest for _____ years. Payments per Month= \$ _____ (Principal & Interest only) Amount \$ _____

FHA (____ Discount Points)	Fixed Rate	New Loan
Conventional	Variable Rate	Assumed Existing Loan Balance
VA (____ Discount Points)	All Inclusive D.T. (\$_____ Wrapped)	Bank or Savings & Loan
Cal-Vet	Loan Carried by Seller	Finance Company

 Balloon Payment Yes No Due Date _____ Amount \$ _____

C. SECOND DEED OF TRUST @ _____ % interest for _____ years. Payments per Month= \$ _____ (Principal & Interest only) Amount \$ _____

Bank or Savings and Loan	Fixed Rate	New Loan
Loan Carried by Seller	Variable Rate	Assumed Existing Loan Balance

 Balloon Payment Yes No Due Date _____ Amount \$ _____

D. OTHER FINANCING: Is other financing involved not covered in (b) or (c) above? Yes No

Type _____ @ _____ % interest for _____ years. Payments per Month= \$ _____ (Principal & Interest only) Amount \$ _____

Bank or Savings and Loan	Fixed Rate	New Loan
Loan Carried by Seller	Variable Rate	Assumed Existing Loan Balance

 Balloon Payment Yes No Due Date _____ Amount \$ _____

E. WAS AN IMPROVEMENT BOND ASSUMED BY THE BUYER? Yes No Outstanding Balance: Amount \$ _____

F. TOTAL PURCHASE PRICE (or acquisition price, if traded or exchanged, include real estate commission if paid.)

Total Items A through E

\$

G. PROPERTY PURCHASED Through a broker Direct from Seller From a family member Other (explain) _____

If purchased through a broker, provide broker's name and phone number: _____

Please explain any special terms, seller concessions or financing and any other information that would help the Assessor understand the purchase price and terms of sale.

PART IV: PROPERTY INFORMATION

A. TYPE OF PROPERTY TRANSFERRED:

Single Family Residence	Agricultural	Timeshare
Multiple Family Residence (no. of units _____)	Co-op/Own-your-own	Manufactured Home
Commercial/Industrial	Condominium	Unimproved Lot
Other (Description: _____)		

B. IS THIS PROPERTY INTENDED AS YOUR PRINCIPAL RESIDENCE? Yes No

If yes, enter date of occupancy _____ Month Day Year or intended occupancy _____ Month Day Year

C. IS THIS PERSONAL PROPERTY INCLUDED IN PURCHASE PRICE (i.e. furniture, farm equipment, machinery, etc.) (other than a manufactured home subject to local property tax)? Yes No

If yes, enter the value of the personal property included in the purchase price \$ _____ (Attach itemized list of personal property)

D. IS A MANUFACTURED HOME INCLUDED IN PURCHASE PRICE? Yes No

If yes, how much of the purchase price is allocated to the manufactured home? \$ _____

Is the manufactured home subject to local property tax? Yes No What is the Decal Number? _____

E. DOES THE PROPERTY PRODUCE INCOME? Yes No If yes the income is from:

Lease/Rent	Contract	Mineral Rights	Other – Explain _____
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F. WHAT WAS THE CONDITION OF PROPERTY AT THE TIME OF SALE?

Good	Average	Fair	Poor
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Please explain the physical condition of the property and provide any other information (such as restrictions, etc.) that would assist the Assessor in determining the value of the property.

I certify that the foregoing is true, correct and complete to the best of my knowledge and belief.

Signed _____ Date _____
NEW OWNER / CORPORATE OFFICER

Please print Name of New Owner / Corporate Officer _____
Phone Number where you are available from 8:00 a.m. – 5:00 p.m. _____

(NOTE: The Assessor may contact you for further information)

If a document evidencing a change of ownership is presented to the recorder for recordation without the concurrent filing of a preliminary change of ownership report the recorder may charge an additional recording fee of twenty dollars (\$20.00).