



Invoice # 111111

## **DOCUMENT SIGNING INSTRUCTIONS**

Please follow the instructions below to ensure that your document will be recorded as quickly as possible and to minimize any rejection by a recording jurisdiction.

### **1. Forms and Special Instructions for the State of California:**

**We have prepared a Deed to transfer 100% of the Title of the property from John Doe and Jane Doe to The Doe Family Trust, as requested. If this is not what you intended contact us BEFORE signing this deed. Revision fees may apply. Please be aware that the Trust must be executed (i.e., signed before a Notary and witnesses) BEFORE this Deed is executed.**

- ☒ **Do not sign these documents electronically or use online notarization.** Although electronic signature is acceptable on some documents, Deeds/Affidavits of Death require an original wet signature of the owners and notary. If you choose to utilize online notarization we will submit the deed to the county as-is but make no guarantees that it will be accepted. **If the deed is rejected then a second recording service fee will apply.**
- ☒ **Note regarding all signatures:** Please sign exactly as shown, i.e. if your middle initial, middle name, suffix, a/k/a, f/k/a, title, or capacity (Trustee, Managing Member, etc.) is included on the signature line be sure to sign that way. Failure to do so may cause the document to be rejected for recording.
- ☒ **Important Note: If anyone will be signing with a Power of Attorney (POA) you must notify us before signing this document as revisions are required. Signing with a POA will delay and complicate your order.** It is easier to complete your order if each grantor signs for themselves even if they must sign at different times or locations. Please contact us if separate signing page are needed. **If signing by POA cannot be avoided please call or email us for further details.**
- ☒ **Grant Deed** - included with deed package
- ☒ **John Doe and Jane Doe**, please sign **exactly** as shown.
- ☒ Failure to do so may cause the document to be rejected for recording.
- ☒ **Please Note:** If you are printing the Deed package from an email each page must be on its own piece of paper. **Double-sided Deeds are not accepted for recording.** You may need to adjust your printer settings to prevent double-sided printing.
- ☒ **Preliminary Change of Ownership Form** - included with deed package
  - Indicate if the property is your principal residence and complete daytime telephone number.
  - **Please answer the 'DISABLED VETERAN' question under subject property address.**
  - Parts 1 and 3 are complete; Parts 2 and 4 do not need to be completed.
  - Certification – **John Doe, Co-Trustee** signs and dates form. Please sign **exactly** as shown, with **Co-Trustee** after your name.

**Forms and Special Instructions for the State of California (continued):**

2. **Please review your document for accuracy and contact our office with any corrections/revisions\* before you sign.**

Your review of the enclosed documents should include the spelling of all parties' names, their mailing addresses, the property addresses, zip codes etc. If we have researched a copy of your last recorded deed, those results are deemed reliable but are not guaranteed because a fully-insured title search was not performed. If you have reason to believe the legal description used on this deed is not correct please contact our office to discuss. **BY SIGNING AND RETURNING THESE DOCUMENTS TO OUR OFFICE FOR RECORDING YOU AGREE THAT YOU HAVE REVIEWED ALL ITEMS AND THEY ARE CORRECT.**

\*Please note in certain circumstances correction or revision fees will apply.

3. **Have documents signed and notarized:** Before your documents can be recorded, you must sign them in front of a Notary. Notaries can be found at local banks, grocery stores, Mail Boxes Etc. stores, UPS stores, Postnet, and other businesses that offer mail services.
4. Please keep any additions to your document (i.e. signatures, notary seals and information, etc.) within the margins of the deed. Many recording districts reject or add additional fees to documents with content outside the margins of the document.
5. **Please return the entire Deed and all Forms with original signatures** (photocopies will be rejected by the County Recorder). Our mailing and overnight delivery address is:

**Deed Network, LLC, 1349 Galleria Drive, Suite 100, Henderson, NV 89014-8624**

**If you have any questions please call 888-736-7990 (Mon. – Fri. 8am - 5pm PST)  
or email [documents@deednetwork.com](mailto:documents@deednetwork.com)**

**ATTENTION PROPERTY OWNER AND NOTARY**

**PLEASE BE AWARE OF THE FOLLOWING REGARDING NOTARIZATION OF THIS DOCUMENT**

- 1) THE NOTARY STAMP OR SEAL MUST BE CLEAR AND LEGIBLE. IF ANY PRINTED INFORMATION IS BLURRED RE-STAMP TO AVOID REJECTION.
- 2) THIS DOCUMENT HAS SPECIFIC MARGINS AND IF ANY SIGNATURE, PRINT OR STAMP INFRINGES ON THE MARGIN THEN ADDITIONAL RECORDING FEES MAY APPLY. PLEASE STAY WITHIN THE DESIGNATED LINE OR SPACE PROVIDED FOR STAMP AND SEALS.
- 3) BE SURE THE NOTARY SIGNS HIS/HER NAME, PRINTS HIS/HER NAME AND INCLUDES HIS/HER COMMISSION EXPIRATION DATE WHERE REQUESTED.
- 4) THE NOTARY BLOCK ON THIS DOCUMENT HAS BEEN FORMATTED TO MEET THE REQUIREMENTS OF THE STATE WHERE THE PROPERTY IS LOCATED. IF YOU ARE NOTARIZING THIS DEED IN A DIFFERENT STATE AND THE FORMAT DOES NOT MEET THE STANDARDS OF THE SIGNING STATE THEN THE NOTARY CAN ATTACH AN ALL-PURPOSE NOTARY ACKNOWLEDGMENT THAT MEETS THE LOCAL STANDARD. FOR A DEED BE SURE THAT AN ATTACHED ACKNOWLEDGMENT IS AN **ALL PURPOSE NOTARY ACKNOWLEDGMENT**. FOR AN AFFIDAVIT BE SURE THAT YOU ATTACH A JURAT INSTEAD OF AN ACKNOWLEDGMENT.

**IF YOU ARE SIGNING THIS DEED OUTSIDE THE UNITED STATES**

- 1) IT IS RECOMMENDED TO SIGN AND NOTARIZE THIS DOCUMENT AT A US EMBASSY OR US CONSULATE. THIS IS TO ENSURE THE NOTARIZATION WILL BE ACCEPTED FOR RECORDING AND RECOGNIZED BY TITLE COMPANIES FOR FUTURE TITLE INSURED TRANSFERS.
- 2) FOR ACTIVE DUTY MILITARY THE DOCUMENT MAY ALSO BE SIGNED ON BASE OR BY THE JAG OFFICE.
- 3) A LIST OF US EMBASSIES AND US CONSULATES CAN BE FOUND AT

<http://www.usembassy.gov/>

- 4) IF THIS DOCUMENT IS SIGNED OUTSIDE THE UNITED STATES BUT NOT AT A US EMBASSY, US CONSULATE OR US MILITARY BASE WE CANNOT GUARANTEE THE DEED WILL RECORD OR BE RECOGNIZED AS A LEGAL DOCUMENT IN THE FUTURE.

**Recording Requested By:**

John Doe  
1234 Main Street  
El Cerrito, California 94000

**After Recording Mail To:**

John Doe  
1234 Main Street  
El Cerrito, California 94000

**APN:** 505-000-000

**GRANT DEED**

**TITLE OF DOCUMENT**

The undersigned grantor(s) declare(s):

Documentary transfer tax is \$0.00 EXEMPT: This conveyance transfers an interest into or out of a Living Trust, R & T 11930.

Exempt from fee per GC 27388.1 (a) (2); document represents a transfer of real property that is a residential dwelling to an owner-occupier.

- (    ) Computed on full value of property conveyed, or
- (    ) Computed on full value less liens and encumbrances remaining thereon at time of sale.
- (    ) Unincorporated area (**XX**) City of **El Cerrito**

FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged, **John Doe and Jane Doe, husband and wife, as community property**, GRANTOR, hereby grant(s) to **John Doe and Jane Doe, Co-Trustees of The Doe Family Trust**, GRANTEE, that certain real property situated in the City of **El Cerrito**, County of **Contra Costa**, State of **California**, described as follows:

LOT 22, AS DESIGNATED ON THE MAP ENTITLED "ARLINGTON ESTATES, EL CERRITO, CONTRA COSTA COUNTY, CALIFORNIA" WHICH MAP WAS FILED IN THE OFFICE OF THE RECORDER OF THE COUNTY OF CONTRA COSTA, STATE OF CALIFORNIA, ON SEPTEMBER 23, 1926, IN VOLUME 20 OF MAPS AT PAGE 524.

MORE commonly known as: **1234 Main Street**  
**El Cerrito, California 94000**

Prior Recorded Doc. Ref.: **Grant Deed**: Recorded: **March 11, 2011**; Doc. No. **2011-0074497**

SUBJECT TO: Any Restrictions, Conditions, Covenants, Rights, Rights of Way, and Easements now of record.

**MAIL TAX STATEMENTS**

**John Doe, Co-Trustee, et al, 1234 Main Street, El Cerrito, CA 94000**

WITNESS my/our hand(s), this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
John Doe

\_\_\_\_\_  
Jane Doe

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

**STATE OF** \_\_\_\_\_)

ss

**COUNTY OF** \_\_\_\_\_)

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Insert Name of Notary Public and Title)

personally appeared **John Doe and Jane Doe**, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

**I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.**

**NOTARY STAMP/SEAL**

WITNESS my hand and official seal.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Printed Name of Notary Public

My Commission Expires: \_\_\_\_\_

**ATTENTION NOTARY: Although the information requested below is OPTIONAL, it could prevent fraudulent attachment of this certificate to another document.**

THIS CERTIFICATE **MUST** BE ATTACHED TO  
THE DOCUMENT DESCRIBED AT RIGHT.

Title of Document Type: \_\_\_\_\_

Number of Pages: \_\_\_\_\_ Date of Document: \_\_\_\_\_

Signer(s) Other Than Named Above: \_\_\_\_\_

**Gus Kramer****County Assessor**

2530 Arnold Drive, Suite 100

Martinez, CA 94553-4359

FAX: (925) 313-7488

Telephone: (925) 313-7400

<http://www.cccounty.us/assessor>**PRELIMINARY CHANGE OF OWNERSHIP REPORT**

To be completed by the transferee (buyer) prior to a transfer of subject property, in accordance with section 480.3 of the Revenue and Taxation Code. A *Preliminary Change of Ownership Report* must be filed with each conveyance in the County Recorder's office for the county where the property is located.

NAME AND MAILING ADDRESS OF BUYER/TRANSFEEE  
(Make necessary corrections to the printed name and mailing address)

ASSESSOR'S PARCEL NUMBER

SELLER/TRANSFEROR

BUYER'S DAYTIME TELEPHONE NUMBER

( )

BUYER'S EMAIL ADDRESS

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.

MO	DAY	YEAR

☐ YES ☐ NO Are you a 100% rated disabled veteran who was compensated at 100% by the Department of Veterans Affairs or an unmarried surviving spouse of a 100% rated disabled veteran?

MAIL PROPERTY TAX INFORMATION TO (NAME)

MAIL PROPERTY TAX INFORMATION TO (ADDRESS)

CITY

STATE

ZIP CODE

**PART 1. TRANSFER INFORMATION***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 of 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/grantor's principal residence? ☐ YES ☐ NO  
Is this a family farm? ☐ YES ☐ NO
- ☐ ☐ \*D. This transfer is the result of a cotenant's death. Date of death \_\_\_\_\_
- ☐ ☐ \*E. This transaction is to replace a principal residence owned by a person 55 years of age or older.
- ☐ ☐ \*F. This transaction is to replace a principal residence by a person who is severely disabled.
- ☐ ☐ \*G. This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for which the Governor proclaimed a state of emergency.
- ☐ ☐ H. 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: \_\_\_\_\_
- ☐ ☐ I. The recorded document creates, terminates, or reconveys a lender's interest in the property.
- ☐ ☐ J. This transaction is recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security interest (*e.g., cosigner*). If YES, please explain: \_\_\_\_\_
- ☐ ☐ K. The recorded document substitutes a trustee of a trust, mortgage, or other similar document.
- ☐ ☐ L. This is a transfer of property:  
1. to/from a revocable trust that may be revoked by the transferor and is for the benefit of  
☐ the transferor, and/or ☐ the transferor's spouse ☐ registered domestic partner.  
2. to/from an irrevocable trust for the benefit of the  
☐ creator/grantor/trustor and/or ☐ grantor's/trustor's spouse ☐ grantor's/trustor's registered domestic partner.
- ☐ ☐ M. This property is subject to a lease with a remaining lease term of 35 years or more including written options.
- ☐ ☐ N. This is a transfer between parties in which proportional interests of the transferor(s) and transferee(s) in each and every parcel being transferred remain exactly the same after the transfer.
- ☐ ☐ O. This is a transfer subject to subsidized low-income housing requirements with governmentally imposed restrictions, or restrictions imposed by specified nonprofit corporations.
- ☐ ☐ \*P. This transfer is to the first purchaser of a new building containing a ☐ leased ☐ owned active solar energy system.
- ☐ ☐ Q. Other. This transfer is to \_\_\_\_\_

\* Please refer to the instructions for Part 1. Please provide any other information that will help the Assessor understand the nature of the transfer.

**THIS DOCUMENT IS NOT SUBJECT TO PUBLIC INSPECTION**

*Check and complete as applicable.***PART 2. OTHER TRANSFER INFORMATION**

A. Date of transfer, if other than recording date: \_\_\_\_\_

B. Type of transfer:

☐ Purchase ☐ Foreclosure ☐ Gift ☐ Trade or exchange ☐ Merger, stock, or partnership acquisition (Form BOE-100-B)☐ Contract of sale. Date of contract: \_\_\_\_\_ ☐ Inheritance. Date of death: \_\_\_\_\_☐ Sale/leaseback ☐ Creation of a lease ☐ Assignment of a lease ☐ Termination of a lease. Date lease began: \_\_\_\_\_

Original term in years (including written options): \_\_\_\_\_ Remaining term in years (including written options): \_\_\_\_\_

☐ Other. Please explain: \_\_\_\_\_C. Only a partial interest in the property was transferred. ☐ YES ☐ NO If YES, indicate the percentage transferred: \_\_\_\_\_ %**PART 3. PURCHASE PRICE AND TERMS OF SALE***Check and complete as applicable.*

A. Total purchase price \$ \_\_\_\_\_

B. Cash down payment or value of trade or exchange excluding closing costs Amount \$ \_\_\_\_\_

C. First deed of trust @ \_\_\_\_\_ % interest for \_\_\_\_\_ years. Monthly payment \$ \_\_\_\_\_ Amount \$ \_\_\_\_\_

☐ FHA (\_\_\_\_ Discount Points) ☐ Cal-Vet ☐ VA (\_\_\_\_ 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 payment \$ \_\_\_\_\_ Amount \$ \_\_\_\_\_

☐ Fixed rate ☐ Variable rate ☐ Bank/Savings & Loan/Credit Union ☐ Loan carried by seller☐ Balloon payment \$ \_\_\_\_\_ Due date: \_\_\_\_\_E. Was an Improvement Bond or other public financing assumed by the buyer? ☐ YES ☐ NO Outstanding balance \$ \_\_\_\_\_

F. Amount, if any, of real estate commission fees paid by the buyer which are not included in the purchase price \$ \_\_\_\_\_

G. The property was purchased: ☐ Through real estate broker. Broker name: \_\_\_\_\_ Phone number: \_\_\_\_\_☐ Direct from seller ☐ From a family member-Relationship \_\_\_\_\_☐ Other. Please explain: \_\_\_\_\_

H. Please explain any special terms, seller concessions, broker/agent fees waived, financing, and any other information (e.g., buyer assumed the existing loan balance) that would assist the Assessor in the valuation of your property.

**PART 4. PROPERTY INFORMATION***Check and complete as applicable.*

A. Type of property transferred

☐ Single-family residence☐ Co-op/Own-your-own☐ Manufactured home☐ Multiple-family residence. Number of units: \_\_\_\_\_☐ Condominium☐ Unimproved lot☐ Other. Description: (i.e., timber, mineral, water rights, etc.) \_\_\_\_\_☐ Timeshare☐ Commercial/IndustrialB. ☐ 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.

If YES, enter the value attributed to the manufactured home: \$ \_\_\_\_\_

☐ 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: \_\_\_\_\_

**CERTIFICATION***I certify (or declare) 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.*

SIGNATURE OF BUYER/TRANSFeree OR CORPORATE OFFICER

DATE

TELEPHONE

NAME OF BUYER/TRANSFeree/PERSONAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT)

TITLE

EMAIL ADDRESS

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



## ADDITIONAL INFORMATION

Please answer all questions in each section, and sign and complete the certification before filing. This form may be used in all 58 California counties. If a document evidencing a change in 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).

**NOTICE:** The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the County Assessor. Supplemental assessments are not paid by the title or escrow company at close of escrow, and are not included in lender impound accounts. **You may be responsible for the current or upcoming property taxes even if you do not receive the tax bill.**

**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 very important. 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 exactly 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.





**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.

