Under the provisions of Proposition 58, an ownership transfer between parents and children may qualify for exclusion from reassessment. A transfer may only qualify for this exclusion if a Parent/Child claim form is properly completed and returned to the Assessor's Office. We are providing these instructions to assist you in completing the form.

NOTE: If you are making annual, incremental transfers to your children, a separate claim form must be filed for each recorded transfer to qualify for exclusion.

INSTRUCTIONS FOR COMPLETING THE PARENT/CHILD EXCLUSION CLAIM FORM

A. PROPERTY		
Assessor's Parcel Number: Enter all the parcel numbers that are involved in this specific transfer. On your letter (top right corner) you will see one parcel listed. If you are unsure of all the parcels, you may list just the parcel shown on your letter.		
Property Address: Enter the street address of the parcel(s).		**City**: Enter the city in which the property is located.
Recorder's Document No.: This is the number assigned to each recorded document. On your letter (top right corner) you will see the official record number. Enter that number here. If you haven't recorded a document, leave this box blank.		**Date of Purchase or Transfer:** Enter the recording date as shown on the letter (top right corner). Or, if the transfer is the result of a death, please leave this box blank. Enter the date of death in the box below.
Probate No.: If this property was probated, enter the official case record number.	**Date of Death:** If this transfer is the result of the owner's death, enter the date the death occurred.	**Date of Decree of Distribution:** If available.

B. TRANSFEROR(S)/SELLER(S)

1. **Print full name(s) of transferor(s):**
   Transferors are those who are GIVING some or all interest in a property. A transferor can also be a decedent whose estate is being transferred to heirs that are children or parents.
   If the property was held in a revocable TRUST at the time of the transfer, the TRUSTOR/SETTLOR of the trust is considered to be the owner/transferor of the property.
   If you need more space, use chart B on the reverse.
2. **Social Security Number(s):**
   Enter the Social Security Number(s) of all the transferors.
   IMPORTANT: The claim form must have all of the transferors' Social Security Number(s) to be complete.
3. **Family Relationship to Transferee(s):**
   To qualify, a transferor's relationship to the transferees may be that of parents, stepparents, in-laws, children, stepchildren, or adopted children. List whether the person(s) giving the property are the mother, father, son, daughter, stepson, etc. of the person(s) receiving the property.
   Example: If the transferors are a mother and father giving property to a child, you would answer mother and father. If the transferor is a child giving property to her parents, you would answer daughter.
4. **Was this property the transferor's principal residence?**
   The transferor(s) must have been granted the Homeowner's Exemption or Disabled Veterans' Exemption on the property for it to qualify as their principal residence. If you answer yes to this question, please check which exemption was granted on the property.
5. **Are you transferring real property other than the principal residence of the transferor?**
   If this transfer involved more than one parcel, then we need to know which of the parcels, if any, is the principal residence. All other parcels need to be clearly identified on the form.
6. **Was only a partial interest in the property transferred?**
   If less than 100% of the property was transferred, answer Yes and tell us how much interest was transferred.
7. **Was this property owned in joint tenancy?**
   Were the transferor and transferee joint tenants of this property immediately prior to this transfer?

8. **If the transfer was through the medium of a trust, please attach a copy of the trust.**
   If the property was not held in a trust, disregard this question. This only applies to a transfer resulting from the death of a Trustor/Settlor of a trust.
   The Assessor's Office only requires the cover page and those pages that list the beneficiaries and how the property is to be distributed. Please do not send the entire trust document. You may receive a Death of Property Owner statement along with this claim form. Please complete and return it to the Assessor's Office as well.

CERTIFICATION:

All of the transferors must sign unless the legal representative has Power of Attorney.

If this transfer is the result of the death of an owner/transferor, the heirs may sign in the decedents place.

C. TRANSFEREE(S)/BUYER(S)

1. **Print Full Names of Transferee(s):** Transferees are all those individuals RECEIVING some or all interest in a property. If you need more space to list all of the transferees, use chart C near the bottom of the claim form.
2. **Family Relationship to Transferor(s):**
   Enter the relationship to the transferor. List whether the person(s) receiving the property are the mother, father, son, daughter, stepson, etc. of the person(s) giving the property. For example, if you are receiving property from your parents, you would answer son, daughter, stepson, etc.
   - If you are adopted, please enter your age at the time you were adopted.
   - If a step-parent/step-child relationship is involved, please answer the three questions pertaining to that relationship.
   - If an in-law relationship is involved, please answer the three questions pertaining to that relationship.
3. **ALLOCATION OF EXCLUSION:**
   This only applies to property other than the principal residence. Call us if you are transferring property other than the principal residence and we will explain what you need to do.

CERTIFICATION:

Only one transferee needs to sign the claim.

IMPORTANT: Be sure you include a daytime telephone number so we may contact you if your claim is incomplete.

TO CONTACT US:

WEBSITE : www.co.santa-cruz.ca.us
Go to *Select a Department* and click on *Assessor's Office*.
Go to the *Property Tax Information Center* to download Assessor forms.

MAILING ADDRESS:
SEAN SALDAVIA, ASSESSOR
COUNTY OF SANTA CRUZ
701 OCEAN ST #130
SANTA CRUZ, CA 95060

PHONE: IF YOU STILL NEED HELP: (831) 454-2002.