



**Gary L. Svanda**  
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**CLAIM FOR REASSESSMENT EXCLUSION FOR  
TRANSFER FROM GRANDPARENT TO GRANDCHILD**

NAME AND MAILING ADDRESS  
(Make necessary corrections to the printed name and mailing address.)

**A. PROPERTY**

ASSESSOR'S PARCEL NUMBER	PROPERTY ADDRESS
DATE OF PURCHASE OR TRANSFER	RECORDER'S DOCUMENT NUMBER
DATE OF DEATH OF GRANDPARENT (if applicable)	PROBATE NUMBER (if applicable)

The disclosure of social security numbers is mandatory as required by Revenue and Taxation Code section 63.1. [See Title 42 United States Code, section 405(c)(2)(C)(i) which authorizes the use of social security numbers for identification purposes in the administration of any tax.] A foreign national who cannot obtain a social security number may provide a tax identification number issued by the Internal Revenue Service. The numbers are used by the Assessor and the state to monitor the exclusion limit.

**B. TRANSFEROR(S)/SELLER(S) (GRANDPARENTS)**

- Print full name(s) of transferor(s) \_\_\_\_\_
- Was this property the principal residence of the transferor?  Yes  No  
If **yes**, please check which one of the following exemptions was granted or was eligible to be granted on this property:  
 Homeowners' Exemption  Disabled Veterans' Exemption
- Was real property other than the principal residence of the transferor transferred?  Yes  No
- Was only a partial interest in the property transferred?  Yes  No If yes, percentage transferred \_\_\_\_\_%.
- Did you own this property as a joint tenant?  Yes  No
- Print name(s) of child(ren) of transferor(s)/seller(s) who is(are) the parent(s) of transferee(s) (grandchild):  
\_\_\_\_\_

**IMPORTANT: If the transfer was through the medium of a will and/or trust, you must attach a full and complete copy of the will and/or trust and all amendments.**

**CERTIFICATION**

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and any accompanying statements are true and correct to the best of my knowledge and that I am the grandparent (or their legal representative) of the transferees listed in Section C. I knowingly am granting this exclusion and will not file a claim to transfer the base year value of my principal residence under Revenue and Taxation Code section 69.5.

SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	PRINTED NAME	DATE
SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	PRINTED NAME	DATE
MAILING ADDRESS	DAYTIME PHONE NUMBER ( )	
CITY, STATE, ZIP	EMAIL ADDRESS	

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



**C. TRANSFEREE(S)/BUYER(S) (GRANDCHILD)** (additional transferees please complete "D" below)

1. Print full name(s) of transferee(s) \_\_\_\_\_  
 Family relationship(s) to transferor(s) \_\_\_\_\_  
 If adopted, age at time of adoption \_\_\_\_\_ Adopted by whom? \_\_\_\_\_

2. Parent: Name of direct descendant of grandparent (child) \_\_\_\_\_  
 Date of death of direct descendant \_\_\_\_\_

**(Direct descendant must be deceased in order to qualify for this exclusion. Please provide death certificate.)**

Social security number of direct descendant: \_\_\_\_\_

a. Was deceased parent married or in a registered domestic partnership (*registered means registered with the California Secretary of State*) as of the date of death?  Yes  No

b. Is the spouse or registered domestic partner of the deceased parent a (*check one*):  
 Parent of the grandchild (*go to question c*).  
 Stepparent of the grandchild (*a stepparent to the grandchild need not be deceased in meeting the condition that "all of the parents" of the grandchild must be deceased*) (*go to question 3*).

c. Had surviving spouse/partner remarried or entered into a registered domestic partnership as of the date of purchase or transfer?  
 Yes  No

If **yes**, date of marriage or registration of the domestic partnership must have occurred prior to the date of purchase or transfer to qualify for exclusion. Date of marriage/partnership registration: \_\_\_\_\_ (*Please provide marriage or partnership certificate.*)

If **no**, surviving spouse/partner is still considered a child of grandparents and must also be deceased prior to the purchase or transfer to qualify for exclusion. Date of death \_\_\_\_\_ (*Please provide death certificate.*)

3. Did transferee receive a principal residence from parents? (If transferee has already received an excludable principal residence, or interest therein, from parents, then the purchase or transfer of a principal residence from grandparents will not be excluded as a principal residence but will be applied toward the one million dollar (\$1,000,000) full cash value limit exclusion of other real property received from parents.)  
 Yes  No

If yes: County: \_\_\_\_\_ Assessor's Parcel Number: \_\_\_\_\_

4. Did transferee receive real property other than a principal residence from deceased parent who is a direct descendant of grandparents? (If transferee has already received an excludable principal residence, or interest therein, from parents, then the purchase or transfer of a principal residence from grandparents will not be excluded as a principal residence but will be applied toward the one million dollar (\$1,000,000) full cash value limit exclusion of other real property received from deceased parents.)  Yes  No

If yes, attach list of all previous transfers (include for each property: the county, Assessor's parcel number, situs address, date of transfer, names of all transferees, and the family relationship).

**Note:** The Assessor may require additional legal documentation to support the above answers.

**D. ADDITIONAL TRANSFEREE(S)/BUYER(S) (GRANDCHILD)** (continued)

NAME	RELATIONSHIP

**CERTIFICATION**

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and any accompanying statements are true and correct to the best of my knowledge and that I am the grandchild (or their legal representative) of the transferors listed in Section B. I certify that all my parents who qualify as children of my transferor grandparents are deceased as of the date of transfer or purchase, and that all of the transferees are eligible transferees within the meaning of section 63.1 of the Revenue and Taxation Code.

SIGNATURE OF TRANSFEREE OR LEGAL REPRESENTATIVE	DATE
MAILING ADDRESS	DAYTIME PHONE NUMBER (     )
CITY, STATE, ZIP	EMAIL ADDRESS

