



Deed Preparation Worksheet

Part I.

Grantor (seller) Information: (will be notarized)	Grantee (buyer) Information:
Name(s)	Name(s)
Address:	Address:
City, State, Zip:	City, State, Zip:
Phone:	Phone:

Address of the property to be transferred (if different than Grantor):

_____ County: _____

Address where tax statements are to be mailed (if different than Grantee):

_____ County: _____

Assessor's Parcel Number: _____

Part II. Type of Deed Requested:

- ☐ Grant Deed (transfer of title from one party to another)
- ☐ Interspousal Transfer Deed (transfer of title between spouses or former spouses)
- ☐ Trust Transfer Deed (Transfer of title into a trust)
- ☐ Quitclaim Deed (transfer of title with no warranty of ownership of property)
- ☐ Affidavit of Death of a Joint Tenant (Remove deceased joint tenant from title)
- ☐ Transfer on Death Deed (transfer title to another party on death)

Part III. Please state each Grantees' name and marital status.

Grantee Name:

2nd Grantee Name (if a couple): _____

☐ Husband & Wife ☐ Single ☐ Unmarried ☐ None ☐
☐ Married, as Sole and Separate Property ☐
☐ Registered Domestic Partners ☐ Married Couple

Grantee Name: _____

2nd Grantee Name (if a couple): _____

☐ Husband & Wife ☐ Single ☐ Unmarried ☐ None ☐
☐ Married, as Sole and Separate Property ☐
☐ Registered Domestic Partners ☐ Married Couple



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Grantee Name: _____

2nd Grantee Name (if a couple): _____

☐ Husband & Wife ☐ Single ☐ Unmarried ☐ None ☐
☐ Married, as Sole and Separate Property ☐
☐ Registered Domestic Partners ☐ Married Couple ☐

If this is a Transfer to a Revocable Trust:

_____, _____
Trustee(s) of the _____ dated _____
(Name of the Revocable Trust)

Select the manner of holding title:

☐ Joint Tenants
☐ Community Property with Right of Survivorship
☐ Community Property (without automatic Right of Survivorship)
☐ Tenants in Common
☐ No Designation

Part IV. Preliminary Change of Ownership

Note: A *Preliminary Change of Ownership* form (PCOR) must be completed and submitted to the recorder's office at the same time the deed is recorded.

Is this property your principal residence? Yes ☐ No ☐

Is only a partial interest being transferred? Yes ☐ No ☐

Is the transfer exempt from the Documentary Transfer Tax? Yes ☐ No ☐

Is this full or partial interest being conveyed? _____

Explain: _____

Part V. Parent-Child Transfer

Is this a Transfer between parents and children? Yes ☐ No ☐

If yes, complete a *Claim for Reassessment Exclusion for Transfer Between Parent and Child* form and insert social security numbers of transferors (grantors) here (both parties will be required to sign this form:

_____(ssn) as to _____(name) and

_____(ssn) as to _____(name)

Is this a transfer between grandparents and grandchildren? Yes ☐ No ☐
Is the intervening parent deceased? Yes ☐ No ☐



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(If yes to both questions, complete a *Claim for Reassessment Exclusion for Transfer From Grandparent To Grandchild* form and attach a certified copy of the death certificate of the parent of the grandchild / child of the grandparent. Both parties will be required to sign this form).

Part V.

Are any of the owners deceased? Yes ____ No ____
If yes, was an affidavit death of joint tenant or trustee recorded? Yes ____ No ____

Were there/are there any probate proceedings filed/pending in Superior Court, or decree of distribution recorded? Yes ____ No ____

IMPORTANT NOTE: Only by going through escrow and obtaining title insurance can the grantee(s) be assured as to the extent of liens, encumbrances, easements, etc., that could affect the title of the property being transferred. Furthermore, you are advised to consult an attorney for a full understanding of your rights and obligations under California laws regarding property transfers. The transfer of your property may result in gift taxes, the requirement that a gift tax return be filed, capital gains tax implications, the levy of a documentary transfer tax, may trigger a reassessment of your property, or may result in some other type of tax assessment. It is solely your responsibility to pay any applicable documentary transfer fees that may be levied or to pay any increased taxes in case of a higher property tax reassessment. Consult with a CPA or other tax professional if you have questions regarding the tax implications of this transfer.

ACKNOWLEDGMENT AND AUTHORIZATION

INSTRUCTIONS TO THE LEGAL DOCUMENT ASSISTANT (LDA):

You are hereby instructed to prepare my documents as instructed by me. You are to make NO EXAMINATION OF ANY RECORDS. You are expressly RELIEVED OF ANY LIABILITY for the condition of title to the property and for the validity or sufficiency of my instructions. This waiver applies to all documents that accompany the documents to be recorded, including but not limited to the Preliminary Change of Ownership form and Claim for Reassessment Exclusion forms(s).

I understand that the Legal Document Assistant preparing my documents is NOT an attorney, cannot select forms and DOES NOT give legal advice. I hereby direct the Legal Document Assistant to type and perform certain services as outlined in the Contract for Services which we each executed regarding this matter. I further declare that the foregoing information which I have provided is, to the best of my knowledge, true and correct.

Dated: _____

Signature