



SONOMA COUNTY

Clerk-Recorder-Assessor

www.sonoma-county.org/cra

ASSESSOR DIVISION

585 Fiscal Dr., Rm. 104
Santa Rosa, CA 95403
Tel: (707) 565-1888
Fax: (707) 565-3317

Statement of Change in Beneficial Interest

(R&T Code Sections 60-66 and 480-485)

Upon completion, mail this form to the Sonoma County Assessor.

Instructions: Complete a separate form for each property. Answer each question.

Name of Decedent

APN:

Social Security No:

Date of Death:

Situs:

By action of the Trustee pursuant to terms of the Trust:

A. The trust continues with the present beneficial interests as indicated below:

B. The trust terminates and transfer is to decedent's beneficiaries as indicated below:

Name of Beneficiary

Relationship to Deceased

% To Be Acquired

| Name of Beneficiary | Relationship to Deceased | % To Be Acquired |
|---------------------|--------------------------|------------------|
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Tax statements regarding reassessment should be sent to: (Name, Address & Phone #)

Person to contact for additional information, during normal business hours: (Name & Phone #)

Signature: _____ Date _____

THIS FORM DOES NOT TRANSFER TITLE. It is for assessment purposes only. Before our office can change a name of record, a document must be recorded in the Sonoma County Recorder's Office. You may wish to consult an attorney or title company for information on the correct procedures and forms.

If decedent owned property in Sonoma County that is not included in this correspondence, please list.