

**TRANSFERS TO OR FROM A TRUST**  
 Section 62 (d) of the Revenue and Taxation Code

Assessor's Parcel Number(s): \_\_\_\_\_  
 Recorded Document Number: \_\_\_\_\_  
 Recorded Document Date: \_\_\_\_\_  
 Name of Trust: \_\_\_\_\_

California Revenue and Taxation Code 62(d) provides that a change in ownership shall not include any transfer by the trustor, or by the trustor's spouse, or by both, into a trust for so long as (1) the transferor is the present beneficiary of the trust, or (2) the trust is revocable; or any transfer by a trustee of such a trust described in either clause (1) or (2) back to the trustor; or any creation or termination of a trust in which the trustor retains the reversion and in which the interest of others does not exceed 12 years duration.

1. When the trust was formed, was it  Revocable  Irrevocable
2. If revocable, has it or a portion of it since been changed to irrevocable?  
 Yes, date \_\_\_\_\_  No
3. If revocable, is the person or persons who transferred property into the trust still living?  
 Yes  No

If no, please give names and dates of death \_\_\_\_\_

(Please continue on reverse, if necessary)

4.

Individual Names of All Beneficiaries	% of Ownership	Present (P) or Future (F) Interest	Relations to Transferor (Self/Spouse/Child/etc.)	Is the Beneficiary Living (L) or Deceased (D)	Date of Death (If Applicable)
1.					
2.					
3.					
4.					

(Please continue on reverse, if necessary)

5. If the present beneficiary(ies) was/were other than the transferor or his/her spouse, was the term of the trust limited to 12 years or less?  
 Yes  No If yes, does the property return directly to the transferor at the end of the term?

As required by law, the above information will be kept confidential. If you have any questions, please contact our office at (805) 654-2282.

I certify (or declare), under penalty of perjury, under the laws of the state of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct, and complete to the best of my knowledge and belief.

\_\_\_\_\_  
 Signature of Owner/Agent

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Title of Agent

\_\_\_\_\_  
 Daytime Telephone