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How to Complete Your California Trust Transfer Deed

Transferring Your Home Into Your Revocable Living Trust

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR TRUST TRANSFER DEED.

About this form. A living trust only avoids probate for property that is actually **titled in the trust's name**. A Trust Transfer Deed moves your California real estate from you, as an individual, into your revocable living trust, with you usually serving as trustee. Transfers into your own revocable trust generally owe **no documentary transfer tax** and do **not** trigger a property tax reassessment.

1. **Sign your trust first**
   The trust must already exist. Have the signed trust document in front of you and copy its **exact name and date**, and the trustee names.
2. **Copy details from your current deed**
   Enter the current owners' names exactly as on your deed, the Assessor's Parcel Number, and the legal description, word for word.
3. **Mark the trust exclusion**
   For a transfer into your own revocable trust, mark the first box. The tax amounts are usually $0.
4. **Mark the $75 recording fee box**
   Mark the exemption that applies, if any, or "Not exempt." The County Recorder can tell you which applies.
5. **Sign in front of a notary**
   Every current owner signs. Do **not** sign ahead of time. Bring a current government-issued photo ID. We come to your home or office.
6. **Record it with the County Recorder**
   Record the notarized deed in the county where the property is located, with a **Preliminary Change of Ownership Report** (BOE-502-A) noting the trust exclusion. Recording fees apply.

Good to Know

- Federal law generally prevents lenders from calling a home loan due when you transfer your home into your own revocable trust. Tell your lender and insurer about the transfer.
- Ask your title insurer whether your policy continues to cover the trust, or whether an endorsement is recommended.
- Need a living trust drafted? Gavrilov & Brooks can help — a trust that is not properly funded may still require probate.

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SCAN TO BOOK

Questions about this document? Talk to an attorney. Gavrilov & Brooks Law Firm has attorneys licensed in California, Nevada, and other states. Phone and video consultations are available. **(916) 504-0529** · **www.gavrilovlaw.com**

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Recording Requested By:

_____

When Recorded Mail This Deed and Mail Tax Statements To:

Name: _____

Address: _____

City, State, ZIP: _____

Space Above This Line For Recorder's Use

TRUST TRANSFER DEED

Grant Deed (Excluded from Reappraisal Under California Constitution Article 13A, Section 1, et seq.)

_____ Assessor's Parcel Number (APN)

_____ Title Order No. (if any)

_____ Escrow No. (if any)

THE UNDERSIGNED GRANTOR(S) DECLARE(S):

_____ Documentary transfer tax $

_____ City transfer tax $

There is no consideration for this transfer. This is a trust transfer and is excluded from reappraisal under Section 62 of the Revenue and Taxation Code. Grantor(s) have checked the applicable exemption(s):

☐ Transfer to a revocable trust of which the grantor(s) is/are the present beneficiary(ies): R&T § 11930 and § 62(d)

☐ Transfer from a revocable trust back to the trustor(s): R&T § 11930 and § 62(d)

☐ Other exemption — R&T Code § and explanation:

_____ (code section and explanation)

_____ Signature of declarant or agent determining tax

DECLARATION OF EXEMPTION FROM GOV. CODE § 27388.1 FEE

Building Homes and Jobs Act fee. Mark one if this deed is exempt:

☐ Exempt per GC § 27388.1(a)(2): recorded concurrently "in connection with" a transfer subject to documentary transfer tax

☐ Exempt per GC § 27388.1(a)(2): recorded concurrently "in connection with" a transfer of a residential dwelling to an owner-occupier

☐ Exempt per GC § 27388.1(a)(1): fee cap of $225 reached

☐ Not exempt — fee to be paid at recording

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GRANTOR(S)

(current owner(s) — names exactly as shown on the current deed)

hereby **GRANT(S)** to

(name(s) of trustee(s))

as Trustee(s) of the

(exact name of trust, as written in the trust document) (date of trust)

and any amendments to it,
the following described real property in the County of

(county) (city, or “unincorporated area”)

State of California:

LEGAL DESCRIPTION

Copy exactly from the current deed. If it does not fit, write “See Exhibit A attached” and attach it.

Commonly known as (street address of property)

SIGNATURE OF GRANTOR(S)

Dated: _____

(signature of grantor) (signature of grantor)

(printed name of grantor) (printed name of grantor)

Every grantor named above must sign in front of the notary. Mail tax statements as directed above.

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CERTIFICATE OF ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California)

County of _____)

On _____ before me, _____

(here insert name and title of the officer)

personally appeared _____

, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

(Seal)

Signature _____

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