



OFFICE OF
**ASSESSOR-COUNTY CLERK-
RECORDER & ELECTIONS**
COUNTY OF SAN MATEO

MARK CHURCH
ASSESSOR-COUNTY CLERK-
RECORDER & CHIEF ELECTIONS OFFICER

SAN MATEO COUNTY ASSESSOR
Legal Entity Change in Ownership/Control Questionnaire

Acquiring Entity: _____

Acquired Entity: _____

New name of Entity (if any): _____

Section 64 of the California Revenue and Taxation Code provides that Real Property owned or leased by the acquired entity may be subject to reassessment.

The acquired legal entity is/was the owner of record, subsidiary (include name) or lessee of the following properties, please list below, include additional pages if necessary:

APN: _____, _____, _____
_____, _____, _____

Details of the transfer:

Date of acquisition: ____/____/____.

☐ A change in control has NOT occurred in _____
(Name of Entity)

a legal entity that owns or leases property in San Mateo County.

☐ A change in control has occurred in _____,
(Name of Entity)

a legal entity that leases for a term of less than 35 years including options, in San Mateo County. Please complete the attached Lease Questionnaire if a lease is involved.

I CERTIFY (OR DECLARE) UNDER PENALTY OF PERJURY under the laws of the State of California 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.

Date: _____

Signature of Authorized owner or agent: _____

Printed Name: _____

Daytime work phone number: _____



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**SAN MATEO COUNTY ASSESSOR
Lease Questionnaire**

Name of Lessee: _____

Name of Lessor: _____

Please identify all properties subject to the terms of this lease:

APN: _____, _____

Lease acquired (yes/no):	Lease modified (yes/no):
Date lease commenced:	Modification commenced on
Date lease expires:	Date modification expires:
Number of options to renew:	Number of options to renew:
Years per option:	Years per option:

This lease is for: ☐ Both Land & Improvements, ☐ Land only, ☐ Improvements only.

Yes No

- ☐ ☐ (1) Was this the creation of a leasehold interest in taxable real property for a term of 35 years or more (including renewal options)?
- ☐ ☐ (2) Was this the termination of a leasehold interest in taxable real property which had an original term of 35 years or more (including renewal options)?
- ☐ ☐ (3) Was this the transfer of a leasehold interest having a remaining term of 35 years or more (including renewal options)? If yes, what consideration, if any, was paid for the acquisition of this Leasehold Interest? \$ _____.
- ☐ ☐ (4) Was this the transfer (sale) of a lessor's interest in taxable real property subject to a lease with a remaining term of less than 35 years (including renewal options)?
- ☐ ☐ (5) Was this the creation of a lease with option to purchase?
- ☐ ☐ (6) Does the lessee own the improvements (if any)?

If you answered yes to any of the above questions, please furnish a copy of the lease for our review. The Assessor may contact you for additional information concerning this lease.

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.

Date: _____

Signature of Authorized owner or agent: _____

Printed Name: _____

Daytime work phone number: _____