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## CALIFORNIA - DEED REQUEST

**ATTACH A LEGIBLE COPY OF LATEST RECORDED GRANT DEED OR QUITCLAIM DEED - DO NOT SEND A DEED OF TRUST, DEED OF RECONVEYANCE, MORTGAGE DEED, TAX STATEMENT, OR AFFIDAVIT OF DEATH**

- Please read the instructions carefully and answer each question according to the instructions.
- If a question is optional and/or does not apply to your situation, you must write "NA" or draw a line above the answer blank.
- **Please print legibly in black or blue ink.** Only your written answers will be typed into the documents.
- Answers that go beyond the scope of the workbook will not be typed and may cause delays.
- Changes requested after your documents have been typed and prepared may result in additional charges.

1. **SELECT ONE ONLY:**       QUITCLAIM DEED     TRUST TRANSFER DEED  
    GRANT DEED

GRANTOR INFORMATION - *The Grantor(s) are the **CURRENT OWNERS** who are transferring the property. Check each box that applies and fill in the Grantor information.*

2.  **Current information matches prior deed** - *If the current name and marital status of all grantors match exactly the information in the prior deed, list the name and marital status of the grantor(s) as they appear in the prior deed (see examples below) (Marital status is optional and might not be listed in prior deed).*

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*Examples: John Doe, a married man; Jane Doe, an unmarried woman; John Doe and Jane Doe, husband and wife*

3.  **Current information does NOT match prior deed** - *If the current name or marital status of any grantor does not match exactly the information in the prior deed, list the grantor(s)'current name and marital status along with a description of how title was acquired (see examples below). (Marital status is optional and might not be listed in prior deed).*

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*Examples: John Doe, a married man, who acquired title as a single man; Jane Doe, an unmarried woman, who acquired title as Jane Smith, a married woman; John Doe, an unmarried man, and Jane Doe, an unmarried woman, who both acquired title as husband and wife*

4.  **Grantor is a Living Trust** - *Complete if the grantor is a living trust:*

Name of Trust \_\_\_\_\_

Date of Trust: \_\_\_\_\_

Name of Trustee(s) who will sign the deed: \_\_\_\_\_

STORE: \_\_\_\_\_  
I have reviewed this page for clarity and legibility with the customer.

CUSTOMER: \_\_\_\_\_  
The above answers were provided by me and I did not receive any legal advice from **THE DOCUMENT SPECIALISTS** personnel in completing my forms.

**IF THIS PROPERTY IS INTENDED AS YOUR PRINCIPAL RESIDENCE, PLEASE INDICATE THE DATE OF OCCUPANCY OR DATE OF INTENDED OCCUPANCY \_\_\_\_\_.**

5. What portion of property is being transferred?  All  Other: \_\_\_\_\_

GRANTEE INFORMATION - The Grantee(s) are the **FUTURE OWNERS** who will be receiving the property.

6. GRANTEE(S) NAME(S): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If the Grantee is a Living Trust, please complete these questions.

7. Name of Trust: \_\_\_\_\_ Living Trust

8. Date of Trust: \_\_\_\_\_

9. Name of Trustee: \_\_\_\_\_

10. MANNER OF HOLDING TITLE (check ALL boxes that apply to your situation; if no title is desired, "No Designation" must be marked):

- |  |   |
|--|---|
| <input type="checkbox"/> Living Trust                                  | <input type="checkbox"/> Joint Tenants with Right of Survivorship           |
| <input type="checkbox"/> Community Property with Right of Survivorship | <input type="checkbox"/> Community Property (without Right of Survivorship) |
| <input type="checkbox"/> Married Man                                   | <input type="checkbox"/> Unmarried Man                                      |
| <input type="checkbox"/> Married Woman                                 | <input type="checkbox"/> Unmarried Woman                                    |
| <input type="checkbox"/> Husband and Wife                              | <input type="checkbox"/> Sole & Separate Property                           |
| <input type="checkbox"/> Tenants in Common                             | <input type="checkbox"/> No Designation                                     |

11. COMMONLY KNOWN

ADDRESS OF \_\_\_\_\_  
PROPERTY: \_\_\_\_\_ street address

\_\_\_\_\_ CA \_\_\_\_\_  
city county state zip code

12. THE PROPERTY IS (**CHECK ONE ONLY**):  WITHIN THE CITY LIMITS  
 IN AN UNINCORPORATED AREA

13. ASSESSOR'S PARCEL NUMBER: \_\_\_\_\_

14. TO WHOM AND WHERE SHOULD THE RECORDED DEED AND TAX STATEMENTS BE MAILED?

NAME \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_

ADDRESS \_\_\_\_\_  
street address

\_\_\_\_\_ city state zip code

15. Notary State: \_\_\_\_\_ 16. Notary County: \_\_\_\_\_

**ON THE ATTACHED COPY OF THE LATEST RECORDED DEED, PLEASE CIRCLE THE LEGAL DESCRIPTION YOU WOULD LIKE TYPED ONTO THE NEW DEED.**

STORE: \_\_\_\_\_ CUSTOMER: \_\_\_\_\_  
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**17. Real Property Transfer Tax Exemption Information - NOT FOR REAL PROPERTY LOCATED IN ALAMEDA, RIVERSIDE or SHASTA COUNTY** (Select any appropriate real property tax exemption(s) that you want typed on the deed or complete the "Other" option below. As with all **THE DOCUMENT SPECIALISTS** self-help products, we will not be able to give you legal or tax advice regarding the exemptions. If you have any questions or need assistance in choosing an exemption, you should contact the county recorder's office in the county where the real property is located.) **If the real property is located within Alameda, Riverside or Shasta County, ask your THE DOCUMENT SPECIALISTS Store Representative for the Alameda, Riverside, or Shasta County Addendum.**

- No exemption.** Do not list any transfer tax exemptions on deed.
- Conveyances Transferring Interests Into or out of a Living Trust** "This conveyance transfers an interest into or out of a Living Trust, R & T 11930."
- Conveyances Given For No Value** "This is a bona fide gift and the grantor received nothing in return, R & T 11911."
- Conveyances to Establish Sole and Separate Property of a Spouse** "This conveyance establishes sole and separate property of a spouse, R & T 11911."
- Conveyance in Dissolution of Marriage** "This conveyance is in dissolution of marriage by one spouse to the other, R&T 11927."
- Conveyances Changing Manner in Which Title is Held** "This conveyance changes the manner in which title is held, grantor(s) and grantee(s) remain the same and continue to hold the same proportionate interest, R & T 11911."
- Conveyances to Confirm a Change of Name** "This conveyance confirms a change of name, and the grantor and grantee are the same party, R & T 11911."
- Court Ordered Conveyances Not Pursuant to Sale** "This is a court-ordered conveyance or decree that is not pursuant to sale, R & T 11911."
- Conveyances to Confirm a Community Property Interest when property was purchased with Community Property Funds** "This conveyance confirms a community property interest, which was purchased with Community Property Funds, R & T 11911."
- Conveyance of An Easement or Oil and Gas Lease Where the Consideration and Value is Less Than \$100** "This is a conveyance of an easement (Oil and Gas Lease) and the consideration and value is less than \$100, R & T 11911."
- Conveyances Where the Liens and Encumbrances Are Equal or More Than the Value of Property, and No Further Consideration is Given** "The value of the property in this conveyance, exclusive of liens and encumbrances is \$100 or less, and there is no additional consideration received by the grantor, R & T 11911."
- Conveyances From a Trustee Under a Land Contract at the Consummation of the Contract** "This is a conveyance of equitable title from a trustee, under a land contract, to the vendee at the consummation of the contract, R & T 11911."
- Conveyances From Individual(s)/Legal Entity(ies) to Individual(s)/Legal Entity(ies) Where the Grantors and Grantees Are Comprised of the Same Parties, and Parties Continue to Hold the Same Proportionate Interest. (Exception: Dissolution of a Partnership. R & T 11925 (b))** "The grantors and the grantees in this conveyance are comprised of the same parties who continue to hold the same proportionate interest in the property, R & T 11925(d)"
- Reconveyances Upon Satisfaction of a Debt** "This is a reconveyance of realty upon satisfaction of a debt, R & T 11921."
- Conveyance to Secure a Debt** "This conveyance is to secure a debt, R&T 11921."
- Conveyance Confirming Title in Grantee** "This conveyance confirms title to the grantee(s) who continue to hold the same interest acquired on Date \_\_\_\_\_, Document No. \_\_\_\_\_ wherein \$ \_\_\_\_\_ Documentary Transfer Tax was paid, R&T 11911."
- Other (specify code section):** \_\_\_\_\_

***NOTE:** The transfer of your property may result in the levy of a documentary transfer tax or may trigger a reassessment of your property. 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. Filing a Preliminary Change of Ownership Report (PCOR) will be required by your county. (THE DOCUMENT SPECIALISTS does not type the PCOR.) An extra recording fee is generally charged by the County Recorder's office if the PCOR is not filed at the time of recordation of the document.*

STORE: \_\_\_\_\_

CUSTOMER: \_\_\_\_\_

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