

Checklist of Documents to Submit to the Assessor's Office

If decedent's property was in a trust:

- Death of Real Property Owner [Change in Ownership Statement](#)
- Copy of Death Certificate
- Copy of entire trust, including all amendments and attachments
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), on or after 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), on or after 2-16-2021, if applicable
- [Homeowners' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- [Disabled Veterans' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- Copy of Registered State of California [Declaration of Domestic Partnership](#), if applicable
- Claim for Reassessment Exclusion for [Affidavit of Cotenant Residency](#), if applicable

If decedent had a will:

- Death of Real Property Owner [Change in Ownership Statement](#)
- Copy of Death Certificate
- Copy of signed will
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), on or after 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), on or after 2-16-2021, if applicable
- [Homeowners' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- [Disabled Veterans' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- Copy of Registered State of California [Declaration of Domestic Partnership](#), if applicable
- Claim for Reassessment Exclusion for [Affidavit of Cotenant Residency](#), if applicable

If decedent did not have a will:

- Death of Real Property Owner [Change in Ownership Statement](#)
- Copy of Death Certificate
- Letters of Administration
- List of heirs showing relationship to the decedent
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer between Parent and Child](#), on or after 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), prior to 2-16-2021, if applicable
- Claim for Reassessment Exclusion for [Transfer from Grandparent to Grandchild](#), on or after 2-16-2021, if applicable
- [Homeowners' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- [Disabled Veterans' Property Tax Exemption](#), on or after 2-16-2021, if applicable
- Copy of Registered State of California [Declaration of Domestic Partnership](#), if applicable
- Claim for Reassessment Exclusion for [Affidavit of Cotenant Residency](#), if applicable

Mail to: Sacramento County Assessor's Office

Property Transfer Section
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