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
- 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
- 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
- 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
3701 Power Inn Road Suite 3000
Sacramento, CA  95826