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ASSESSOR-RECORDER

SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

Form 571L-R-STR

Business Property Statement

Manual

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Overview for Filing a Business Property Statement

I

I. OVERVIEW FOR FILING A BUSINESS PROPERTY STATEMENT

Purpose

This user-friendly reference guide provides an overview of the statutory requirements, answers to frequently asked questions (FAQs), and step-by-step instructions for filing a business property statement. The guide is divided into eight sections – (I) Overview for Filing a Business Property Statement, (II) Filing a Form 571-L Electronically (e-File), (II-B) Business Moved/Closed/Sold, (III) Filing a Form 571-L Paper Document, (IV) Filing through the Standard Data Record (SDR) System, (V) Filing a Form 571-STR Paper Document, (VI) General Business Personal Property Frequently Asked Questions (FAQs), (VI-A) E-File FAQ, (VI-B) Short-Term Rental FAQ, (VII) Contact Information, and (VIII) Appendix with samples of common forms related to the 571-L filing process.

Why are you taxing my business assets?

The State Constitution says all property is subject to property tax unless otherwise exempt. Homeowners are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation.

What is Business Personal Property?

Business Property is any tangible property owned, claimed, used, possessed, managed or controlled in the conduct of a trade or business. This includes all machinery, fixtures, office furniture and equipment. In general, business personal property is all property owned or leased by a business except licensed vehicles, business inventory, intangible assets, and application software.

Examples of business property that would be assessed as personal property include but are not limited to:

- Operating Supplies
- Machinery & Equipment
- Office Furniture
- Copiers and Fax Machines
- Telephones
- Computers
- Restaurant Equipment
- Cameras
- Printing Equipment
- Leasehold Fixtures
- Leasehold Structures (Tenant Improvement)

In essence, Business Personal Property is all property used in the course of doing business that is not exempt.

What personal property is exempt?

Personal Property is and can be exempt by reason of its ownership, use and/or type.

Types of property that are exempt:

- Business Inventories held for sale or lease
- DMV licensed vehicles
- Application software (Word, Excel, PowerPoint, etc.)
- Fire suppression systems
- Solar panels

Equipment owned by banks and financial institutions and insurance companies are exempt by **ownership**, while churches, public libraries and schools are exempt by **use**.

Who is required to file the Form 571-L?

Per Revenue and Taxation Code, Section 441, you must file a statement if:

- a) The Assessor's Office has sent you a Notice of Requirement to File Form 571-L Business Property Statement, OR
- b) You have taxable business property with a total cost of \$100,000 or more, located in the City and County as of January 1st of each year, even if the Assessor's Office did not send you a notice or otherwise request you to file a Business Property Statement; OR
- c) If you have not filed a Form 571-L in past years because you were on Direct Billing (assessed based on existing information in our records), you will receive a Notice of Requirement to File Form 571-L Business Property Statement this year because State Law requires a periodic update of Direct Bill accounts. Please file a Form 571-L to reaffirm your business' assessed value has stayed the same or to reflect changes that have taken place resulting in increases or decreases in value of your business property.

Failure to complete and return the property statement will result in the Assessor's Office estimating the value of your business property and adding a 10% penalty to the assessment (R&T Code Sections 441, 463 and 501). Additionally, upon discovery, we are required by law to go back four years and impose the tax on your business, plus penalties and interest (R&T Code Sections 506, 531, and 531.3).

We encourage you to e-File (electronic filing) using your Account Number and Personal Identification Number (PIN) which are pre-printed on the top right of your Notice of Requirement to File Form 571-L Business Property Statement. If you prefer to file your Business Property Statement by mailing it in, you must download and print a hard copy using your business Account Number and PIN. Both the e- Filing and mail in options can be accessed from our website (www.sfassessor.org/efile). For more information, please refer to Part II - Filing a Form 571-L Electronically (e-File).

What is the “lien date”?

The lien date is January 1st 12:01 a.m. every year. All personal property costs are to be reported or declared as of that date. Since the lien date is 12:01 a.m., you will report all personal property in your possession as of December 31st of the previous calendar year. For example, if the lien date is January 1st, , then you would report all personal property in your possession as of December 31st, 2020.

Why am I getting a Notice of Requirement to File Form 571-L, I am no longer in business?

Even though you are no longer in business or have moved out of this location as of lien date January 1st, you received a Notice of Requirement to File Form 571-L and you are required by law to respond.

When are the filing deadlines?

All property statements are due April 1st annually. The last day to file the statements without penalty for this year is May 7th. When mailed through the post office, the forms are required to be postmarked by May 7th. For your protection, it is helpful to get a postage paid receipt for the statements mailed on the deadline day or close to that day. This will help eliminate the possibility of receiving a late filing penalty, because you will have proof of the date it was mailed. For statements filed electronically, the May 7th deadline also applies.

What if I file after May 7th?

May 7th is the last day to file without incurring a penalty. Section 463 of the Revenue and Taxation Code states “that any person who is required by law or is requested by the assessor to make an annual property statement fails to file the business property statement within the time specified, will be subject to a penalty of **10% of the assessed value of the property.**”

What if I do not file at all?

The penalty for not filing the business property statement is also 10% of the assessed value. However, the assessor is also allowed by law to estimate the value of the property based on the information in his possession. This generally is based on the prior year's filing or a site inspection of the business at the physical location.

What information is needed?

The most useful item to aid in completing the Form 571-L is an accurate and up to date asset listing. This list should include:

- The date of acquisition of the equipment
- The total cost (purchase price plus sales tax, freight and installation charges)
- Location of the equipment if you have multiple locations
- Disposal dates of equipment removed

Other records that could be helpful in completing the Form 571-L are the California State Tax Depreciation Schedule-form 4562, General Ledger, Balance Sheet and Income Statement. Some business owners may have purchased an existing business. The information needed in this situation would be the purchase agreement or the escrow papers that would show the breakdown of the equipment, fixtures and leasehold improvement acquired through the purchase of the business.

Confidentiality

The Form 571-L is not a public document. Therefore, the information declared on the Form will be held confidential by the assessor.



Using Community Portal For Filing a Form Electronically (e-File)

II. USING COMMUNITY PORTAL FOR FILING A FORM ELECTRONICALLY (E-FILE)

There are many benefits of e-Filing:

- E-File is a free online application that allows businesses to quickly and securely file the Form via the internet.
- No new software is needed to e-File.
- Businesses are allowed to save the statement in progress and complete it at a later time.
- E-Filing allows businesses to receive an immediate online confirmation once a statement is submitted. In addition, the business will receive an email confirming receipt of filed statement on the email address on file. If you do not see the confirmation number after submitting, it means that your e-File statement is incomplete and did not go through. Please go back and resubmit it.
- Once a business has e-Filed, the Form statements are stored online, allowing businesses the ability to retrieve, view and print prior year e-Filed statements.

We mail out several types of Notices, along with the assigned Account Number(Entity ID) and PIN. By using the Account Number(Entity ID) and PIN provided, you can meet your filing requirements by submitting a completed statement online or by requesting a hardcopy form and returning a completed statement to our office. We strongly encourage you to file your Form electronically using e-File system.

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ASSESSOR-RECORDER



SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

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Info to log into the San Francisco E-File Portal:

Entity ID #:

PIN #:

Filing Due Date: April 1, 2021

Last Day To File Without Penalty: May 7, 2021

NOTICE OF REQUIREMENT TO FILE 2021 BUSINESS PROPERTY STATEMENT

February 12, 2021

Dear Business Owner:

This Notice informs you of your business personal property filing obligations for 2021. **Your business is being required by the assessor to file for 2021.** State law requires business owners to file the Business Property Statement annually with the County Assessor for every business located within the County (R & T Code, Sec. 441(a)). The last day to file without incurring a penalty is **May 7, 2021**; penalty for filing after May 7th is 10% of total assessed value. **The Office of Treasurer & Tax Collector will mail tax bills for unsecured property to taxpayers by July 2021, and payments will be due by August 31, 2021.**

The [online portal](https://online.sfassessor.org) (<https://online.sfassessor.org>) will begin accepting online statements beginning **February**, . When logging in, enter the Account Number(Entity ID) and PIN. The Account Number(Entity ID) and PIN are unique to your business and provides secure access to your statement, guards your confidential information and protects your privacy. The PIN is only good for this year, , and is non-transferable. If you have businesses that are not listed in your notice, please submit a [general inquiry](https://online.sfassessor.org/s/contactsupport) (<https://online.sfassessor.org/s/contactsupport>) in our online portal so that records can be updated accordingly. If you have not received your notice with Account Number(Entity ID) and PIN, then please submit a [general inquiry](https://online.sfassessor.org/s/contactsupport) (<https://online.sfassessor.org/s/contactsupport>) in our online portal to request another copy of your notice.

You may also send a written request, on your company's letterhead with an authorized signature. Include the Account Number(Entity ID), ownership name, DBA, mailing address, and location of the property, to the Business Personal Property Division by fax (415) 554-5544. Please note that once we receive this request, the Assessor's Office will only mail the PIN to the address that we have in our records. If you are an agent of a taxpayer, an authorization letter from the business owner is required.

If you still have additional questions, please contact the Business Personal Property Division by phone (415) 554-5531) or by submitting a [general inquiry](https://online.sfassessor.org/s/contactsupport) (<https://online.sfassessor.org/s/contactsupport>) in our online portal. Your Business Property Statement is due by April 1st, . The last day to e-File without incurring a penalty is May 7th, . The late filing penalty is 10% of the total assessed value.

II (A). COMMUNITY PORTAL USER'S GUIDE (INSTRUCTIONS FOR ELECTRONIC FILING)

A comprehensive user's guide on how to electronically file (e-File) the below forms is available at [link](https://www.sfassessor.org/Taxpayer_Help_Pages) (https://www.sfassessor.org/Taxpayer_Help_Pages). It includes a step-by-step instruction with sample screens.

- BPP Filing using Forms: 571-L, 571-LA, 571-R and 571-STR
- Vessels Filing using Form: 576-D
- Exemptions Filing using Forms: BOE-267-A, BOE-267, BOE-267-S, BOE-262-AH, BOE-268-B, BOE-260, BOE-576-E, and BOE-264-AH

The Community Portal is supported by the latest version of following web browsers:

- Google Chrome (recommended web browser)
- Mozilla Firefox
- Microsoft Edge (Windows only)
- Apple Safari (Apple Mac OS)
- Adobe PDF Reader should also be installed on the computer.

Note: Microsoft Internet Explorer and Mobile devices are NOT supported.

III (B). INSTRUCTIONS FOR FILING THE FORM 571-L

(See Appendix for Sample Forms)

Owner name and DBA name

Please make sure that the information regarding the Owner Name and DBA name are pre-printed correctly on the Form 571-L. If the assessor's information regarding your property is not up to date on the pre-printed Form, please line through the incorrect information and write the correct information on the Form.

Property location and mailing address

It is important that this information is kept up to date with the Assessor's Office. The property location is the address of the business. The mailing address is the address you would like to have the Notice and Tax Bill mailed. It is our office policy not to mail the Notice to agents' addresses. However, if you are a sole proprietor and would like to have the Notice to be mailed to your home, or P.O. Box, that is perfectly acceptable. If your mailing address has changed, please contact our office immediately to update the information.

Part I. General Information (a) through (g)

All the information pre-printed under this section of the Business Property Statement is vital to the Assessor's Office in keeping accurate records of your business as well as mailing out the Tax Bill. Although the email address is optional, it would be helpful information to assist us in contacting you.

Part II. Declaration of Property Belonging to You

This section of the Business property Statement is where you declare the equipment that belongs to you and the equipment that you may be leasing to others. For most small businesses, you will only need to complete sections 1, 2 and 4 of Part II of the Business Property Statement.

Supplies

Supplies are those items that are used in the ordinary course of business and are not intended for sale or lease. The reportable supplies are those supplies on hand as of the January 1st lien date. Types of supplies could include stationary and office supplies, janitorial supplies, chemical supplies and computer supplies. Your business may be small to estimate the amount of supplies. If your business maintains an Income statement, you would use the year-end balances as of December 31st of the previous calendar year and take the average of 12 months. For example, you would take the

Office Supplies year-end total of cost \$12,000/12 months=\$1,000 worth of supplies to be reported on Page 1, Part II line 1 of the Form.

Schedule A – Cost Details: Equipment

Everything reported under Schedule A of the Form relates to Part II, line 2, Equipment on page 1 of the Form 571-L. Include expensed equipment and fully-depreciated equipment on this Schedule. Also include sales or use tax, freight and installation costs. Equipment should be reported by each calendar year of acquisition. To calculate this, add the totals of all equipment acquired in any specific year. Do not report equipment that has been removed from the site or disposed of. The disposal should be deducted from the year the equipment was originally acquired. Please do not report negative numbers or cents. Each cost should be rounded to the nearest dollar.

The equipment reported on this schedule is divided into five categories:

1. Machinery and Equipment for Industry, Profession or Trade
2. Office Furniture and Equipment
3. Other Equipment
4. Tools, Molds, Dies and Jigs
5. (a) Personal Computers
(b) Local Area Network (LAN) Equipment and Mainframes

1. Machinery and Equipment for Industry, Profession, or Trade (Schedule A, column 1)

The equipment reported under this category would include equipment specific to your trade, industry, or profession. If your business is a restaurant, the type of equipment you would report is restaurant equipment. This might include refrigerators, stoves, freezers and various other pieces of equipment related to the restaurant industry. This is why it is important to list the type of business under (a) in Part I. General Information section of the Form. This will assist the assessor in determining the life of the equipment.

2. Office Furniture and Equipment (Schedule A, column 2)

This category consists of furniture and office equipment.

3. Other Equipment (Schedule A, column 3)

This category includes the special types of equipment that do not fit into any other categories. This section of the Form asks you to describe the type of equipment that you report. Some types of the equipment that would fit into this category are: telephones, lab equipment, exercise equipment, fax machines, copiers, unlicensed vehicles and point of sales equipment.

4. Tools, Molds, Dies and Jigs (Schedule A, column 4)

This category would include tools, molds, dies and jigs.

5. (a) Personal Computers (Schedule A, column 5a)

This category mainly includes desktops, printers, laptops, monitors, notebooks, scanners and non-production computer components. **Application software should not be reported. However, operational software should be included.** Any computers used in any application directly related to manufacturing or used to control or monitor machinery and equipment should be reported in column 1 and should not be reported in this section.

(b) Local Area Network (LAN) Equipment and Mainframes (Schedule A, column 5b)

This category includes external storage devices, hubs, mainframes, routers, servers, switches, and LAN components. **Do not include application software in this category.**

Schedule B – Cost Detail: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land & Land Developments

Most small business would only have information for columns 1 and 2 of Schedule B. This is the section of Leasehold Tenant Improvement. It is divided into two types of leasehold improvements: structures and fixtures.

1. Structure Item Only

Improvements are classified as “structure item” when its primary use or purpose is for housing or accommodation of personnel, personalty or fixtures; or when the improvement has no direct application to the process or function of the trade, industry, or profession.

Examples:

- Air conditioning – office and building cooling
- Conveyors – for moving people
- Partitions – floor to ceiling
- Refrigeration systems – that are an integral part of the building

2. Fixture Only

Improvement is classified as “fixture” if its use or purpose directly applies to or augments the process or function of a trade, industry, or profession.

Examples:

- Air conditioning – process cooling
- Conveyors – for moving materials and products
- Partitions – annexed- less than floor to ceiling
- Refrigerators – walk in – unitized – including operating equipment

571-D Supplemental Schedule for Reporting Acquisitions and Disposals of Property Reported in Schedule B

This form is where you report all acquisitions or disposals from Schedule B, columns 1, 2, 3 or 4. For all practical purposes, you will only be dealing with columns 1 and 2. The form is divided into two sections. The first section is for **Additions**, and the second section is for **Disposals**. This form has space for information regarding both situations.

Part III. Declaration of Property Belonging to Others

If property belonging to others or their business entities is located on your premises, report the owner's name and mailing address. If it is leased equipment, read your agreement carefully and enter A (Lessor) or B (Lessee), and whether lessor or lessee has the tax obligation. For assessment purposes, the Assessor will consider, but is not bound to, the contractual agreement.

1. **LEASED EQUIPMENT.** Report the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, the total installed cost to purchase (including sales tax), and the annual rent; do not include in Schedule A or B (see No. 3, below).
2. **LEASE-PURCHASE OPTION EQUIPMENT.** Report here all equipment acquired on lease-purchase option on which the final payment remains to be made. Enter the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, the total installed cost to purchase (including sales tax), and the annual rent. If final payment has been made, report full cost in Schedule A or B (see No. 3, below).
3. **CAPITALIZED LEASED EQUIPMENT.** Report here all leased equipment that has been capitalized at the present value of the minimum lease payments on which a final payment remains to be made. Enter the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, and the total installed cost to purchase (including sales tax). Do not include in Schedule A or B unless final payment has been made.
4. **VENDING EQUIPMENT.** Report the model and description of the equipment; do not include in Schedule A.

5. OTHER BUSINESSES. Report other businesses on your premises.
6. GOVERNMENT-OWNED PROPERTY. If you possess or use government-owned land, improvements, or fixed equipment, or government-owned property is located on your premises, report the name and address of the agency which owns the property, and a description of the property.

Signature Requirements

The law requires that the Form 571-L Business Property Statement, regardless of where it is executed, shall be declared to be true under the **penalty of perjury** under the laws of the State of California. The Business Property Statement must be signed by the **business owner**, a duly-appointed fiduciary, or a person authorized on behalf of the owner.

In the case of a **corporation**, the Form 571-L must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign on behalf of the corporation. In the case of **partnership**, the Form 571-L must be signed by a partner or an authorized employee or agent.

In the case of a **Limited Liability Company (LLC)**, the Form 571-L must be signed by an LLC manager. If the Form 571-L is signed by someone other than a member of the bar, certified public accountant, a public accountant, and enrolled agent or a duly-appointed fiduciary, the San Francisco County Assessor-Recorder's Office requires a written authorization from the owner.

A Business Property Statement that is not signed and executed in accordance with the instructions is considered an invalid filing. The 10% penalty imposed by Section 463 of the Revenue and Taxation Code for failure to file or late filing is applicable to an unsigned or invalid Business Property Statement.

III (C). INSTRUCTIONS FOR FILING THE FORM 571-STR

(See Appendix for a Sample Form)

Part 1. General Information

Owner name

Please make sure that the information regarding the Owner Name is pre-printed correctly on the Form 571-STR. If the assessor's information regarding your property is not up to date on the pre-printed Form, please line through the incorrect information and write the correct information on the Form.

Property location and mailing address

It is important that this information is kept up to date with the Assessor's Office. The property location is the address of the business. The mailing address is the address you would like to have the Notice and Tax Bill mailed. It is our office policy not to mail the Notice to agents' addresses. If your mailing addresses changes, please contact our office immediately to update the information.

Part 2. Leased Property

If you own the personal property (i.e., furnishings and supplies) used / consumed by operating your short term rental business, then check YES. Otherwise, check NO and list the name and address of the owner along with a description of such personal property.

Part 3. Declaration of Property Belonging to You

This section of the Short Term Rental Statement is where you declare the furnishings and supplies used / consumed by operating your short term rental business.

Rental Supplies

This category is reported on page 1, line 4 of the 571-STR form, as one aggregated line item of total annual estimated cost of short term rental incidentals, including toilet paper, paper towels and other supplies consumed by the short term rental business.

Rental Furnishings

This category is listed by asset item, grouped by type and then reported as a total sum per grouping on page 1 of the 571-STR on lines 5, 6 and 7. As shown on page 2, Schedule A, of the 571-STR form, each short term rental asset shall be reported one by one per asset grouping along with the estimate cost and year that items were acquired.

Short term rental asset groupings are:

- Furniture and belongings, includes sofas, tables, chairs, mattresses, bed frames, etc. The total of this asset grouping is reported on page 1, line 5.
 - Bedroom #1
 - Bedroom #2
 - Bedroom #3
 - Bathroom
 - Living area
 - Dining and Kitchen
- Kitchen appliances, includes fridge, stove, microwave, toaster, dish washer, etc. The total of this asset grouping is reported on page 1, line 6.
- Other equipment, includes clothes washer & dryer, vacuum, computers, bikes, etc. The total of this asset grouping is reported on page 1, line 5.

Signature Requirements

The law requires that the Form 571-STR Business Property Statement, regardless of where it is executed, shall be declared to be true under the **penalty of perjury** under the laws of the State of California. The Business Property Statement must be signed by the **business owner**, a duly-appointed fiduciary, or a person authorized on behalf of the owner.

In the case of a **corporation**, the Form 571-STR must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign on behalf of the corporation. In the case of **partnership**, the Form 571-STR must be signed by a partner or an authorized employee or agent.

In the case of a **Limited Liability Company (LLC)**, the Form 571-STR must be signed by an LLC manager. If the Form 571-STR is signed by someone other than a member of the bar, certified public accountant, a public accountant, and enrolled agent or a duly-appointed fiduciary, the San Francisco County Assessor-Recorder's Office requires a written authorization from the owner.

A Short-Term Rental Property Statement that is not signed and executed in accordance with the instructions is considered an invalid filing. The 10% penalty imposed by Section 463 of the Revenue and Taxation Code for failure to file or late filing is applicable to an unsigned or invalid Short-Term Rental Property Statement.



Filing through the SDR System

IV

IV. FILING THROUGH THE STANDARD DATA RECORD (SDR) SYSTEM

Large business filers with multiple locations in one or more counties should use the SDR network to submit statements (data files) all in one upload. Programming and/or special software is required to create SDR data files in the approved XML schema. SDR users are required to register on-line at www.calbpsfile.org. To request a copy of the XML schema, print and submit a Schema Request Form from the Links menu on the homepage.

Filing instructions, help screens, and reference materials are provided on the SDR website. Filers using SDR can print a completed Form 571-L with schedules, filing confirmation and the exact time it was submitted. Statements are stored on-line for seven (7) years, so you can get a copy whenever you need one. Access to your statement(s) is protected with Login ID and Password. Statements are encrypted and transmitted on a secured site to protect confidential information.

IV (A). E-FILE AND SDR CAPABILITIES OVERVIEW

E-FILE	SDR
File One Statement at a Time Complete one statement at a time online (recommended for businesses with 1 to 20 locations in up to 10 counties)	File Many Statements at One Time One to 4000 statements (XML files) can be filed in 1 to 58 counties all at once.
View Statement Data Before Filing Use the PRINT function within e-File to review and print your statement before submitting the statement for certification.	View Statement Data Before Filing Use the SDR-style sheet.
Print Statement After Filing Print the Certification page with the confirmation number and date/time stamp. Use the PRINT function within e-File to print the submitted statement.	Print Statements After Filing No statement print capability available.
Confirmation and Date Each certified statement is assigned a confirmation number and date/time stamp.	Confirmation and Date Each statement is assigned an SDR confirmation number and date/time stamp.
Account Number Account Number is provided on the hardcopy statement/Invitation to e-File. You must use this number to file a statement. The Account Number is unique to each statement.	Account Number Account number is provided by the Assessor. A filer must use this number to submit a statement. The Account Number is unique to each statement.
PIN PIN is provided on the hardcopy statement/Invitation to e-File and must be used with the Account Number to e-File. The PIN is unique to each statement/account number.	PIN Not required to file.
Address Mail to address is required. Situs/property address is required.	Address Mail to address is required. Situs/property address is required.
Statement Type E-File provides fill-in support to create the Form 571-L. E-File does not support Forms 571-A, 571-F, 571-R, 571-STR, 571-P or LEQ; these forms must be submitted on hard copy.	Statement Type SDR supports 571-A, 571-F, Form 571-L, 571-P and 571-R, plus LEQ. Supports all schedules A, B, C, D, E, Alt A and CIP and spare parts.
Registration Not required. Use the Account Number and PIN.	Registration Required.
Amendment/Changes Amendments must be submitted on hardcopy. Notes to Assessor are recommended.	Amendment/Changes Re-file a complete statement for amendments or changes. The new statement will get a new confirmation number and date/time stamp. Notes to Assessor are recommended.
Prior Year Statements Prior year e-File statements are accessible for viewing and printing.	Prior Year Statements None



Business Personal Property Frequently Asked Questions (FAQs)

V

V. GENERAL BUSINESS PERSONAL PROPERTY FREQUENTLY ASKED QUESTIONS (FAQs)

V(A). GENERAL BUSINESS PERSONAL PROPERTY FAQs

1. I would like to e-file this year. Am I eligible to e-file?

Starting in all business and vessel owners are now eligible to use our e-filing portal to file their Business Property Statements. You may participate in e-Filing your statement this year if you received one of the following documents in the mail: 1) a Notice to file, or 2) a Direct Bill Notice, or 4) a Low Value Exemption Notice. If you received one of those notices, your Account Number and PIN are located on the top right corner of your notice and you may proceed to the e-filing portal to submit your Business Property Statement.

2. I have my PIN from last year. Can I use it to e-file this year?

No. For security reasons, your business is assigned a new PIN on an annual basis. Use the PIN printed on your Notice.

3. Am I going to receive a hard copy of the tax form for filing my Business Property Statement?

No, our Office will only mail out hard copies upon request. The Notice you received is sent in lieu of a hard copy of the statement, and your Account Number and Online PIN are printed on the Notice so you can e-file.

4. I didn't receive a Notice; what should I do?

Please e-mail askbpp@sfgov.org or give us a call at (415) 554-5531.

5. What are the advantages of e-Filing?

- **Accessible** : You can access your current and previous years' e-filed statements anytime and anywhere there is an Internet connection.
- **Accurate** : Fewer mistakes in processing the statement because data is loaded electronically.
- **Convenient** : The ability to e-file 24 hours a day, 7 days a week. You may save your data anytime and complete your e-filing later.
- **Efficient** : Faster than mailing, save on postage and minimize usage of paper.
- **Reliable** : A confirmation certification indicating the date and time of filing is issued after the return is submitted.
- **Green**: Let's go green together. Use technology not paper.
- **Confidential** : Only the owner of the Account Number and PIN can view the statement, and it is not a public document.

6. Have questions? Here are some additional resources to assist business owners.

- Online Manual: Please go to www.sfassessor.org/Manual571L-R-STR

7. I'm unable to log on successfully. I continue to receive an error message when I enter in my company's Account Number and PIN.

Please email us at askbpp@sfgov.org or call (415) 554-5531.

8. I forgot my PIN, how do I retrieve it?

Please find your notice sent to you, or email us at askbpp@sfgov.org or call (415) 554-5531.

9. I don't have time to complete the entire form right now. How do I exit the e-file program without completing the final certification step?

You do not have to complete your form at one time. You may save your data at any time by clicking "Save." To exit the e-file program without completing the final certification step, click "Save" and then click "Log Off" from the top center of the e-file screen. The next time you log in to e-file, you can continue at the last uncompleted step.

10. Can I attach documents to e-file?

Yes, you now can attach documents to e-file.

11. How do I know that the Assessor-Recorder's Office received my filing submission?

If you e-filed, then you will receive e-mail confirmation and your filing submission is received same day.

If you mailed hardcopy, then you should wait 10 business days to check that your filing submission has been received into our system. You can use your notice sent to you to check our taxpayer portal to access your account by Account Number and PIN, as provided in the notice.

12. Can I amend my Business Property Statement? And when is the deadline?

Yes, you can amend on line at our taxpayer portal, as provided in the notice, or you can mail us a hardcopy with AMENDED written on the submission.

Pursuant to California [Revenue and Taxation Code Section 441\(i\)](#), statements may be amended without penalty until May 31st.

13. What is the due date for the Business Property Statement?

The due date for filing the Business Property Statement is April 1st.

14. What is the last date to file the Business Property Statement without penalty?

The last day to file your Business Property Statement without a penalty is May 7th (postmarked). Pursuant to California Revenue and Taxation Code Sections 441 (b) & 463, if a business fails to file Business Property Statement or it is filed late, a 10% penalty will be added to the assessment.

15. What is the last date to electronically file the Business Property Statement?

For taxpayers' convenience, the e-file site will allow a taxpayer with privileges to access and file their statements electronically until May 31st (a 10% penalty will be added to the assessment for all statements electronically filed after May 7th). Thereafter, the site will become unavailable for e-Filing statements, and you must file by hard copy (a 10% penalty will be added to the assessment).

16. What if the Business Property Statement is filed after May 8th?

If the Business Property Statement is filed or postmarked after May 7th, regardless of submission method, a 10% penalty will be added to the assessment.

17. How can I get a copy of my current and/or prior year Business Property Statement?

Please use your notice to find your Account Number and PIN to access our taxpayer portal, as provided on the notice. If you e-filed, then you will be able to print out your e-filed statements at our taxpayer portal. If you mailed in hardcopy, then you can send us a customer request for statement copies at our taxpayer portal. Otherwise, please email us at askbpp@sfgov.org or call (415) 554-5531.

18. How is the assessed value determined?

Assessment begins with an analysis of the asset cost, including sales tax, freight and installation costs. The Assessor applies a valuation factor to the asset cost to arrive at the assessed value. The valuation factor is based on the expected economic life of the asset and is different from the depreciation schedule used by Internal Revenue Service, Franchise Tax Board, and tax accountants.

19. If the Business Property Statement is not filed, how will my business' assessed value be determined?

If you do not file a Business Property Statement, the Assessor's Office, directed by state law, will determine an assessable value. In addition, a 10% penalty for failure to file will be added to the assessment, pursuant to California Revenue and Taxation Code Sections 441, 463 and 501. Visit our website for current information on the tax rate and when tax bills be received, <https://www.sfassessor.org/property-information/business-owners/about-business-property-assessments>

20. What if I disagree with my assessment?

If you disagree with an assessment made by the Assessor, we recommend you first discuss it with an Auditor-Appraiser at the Assessor's Office. An Auditor-Appraiser is available Monday through Friday, 8 A.M. to 5 P.M. at (415) 554-5531, or in person at 1155 Market Street, Fifth Floor, San Francisco, CA 94103, from 8 A.M. to 5 P.M. Whether or not you discuss the matter with the Assessor, you also have the right to file an assessment appeal with the Assessment Appeals Board. The Appeals Board is an independent agency representing the Board of Supervisors and is not connected with, nor is it under the control of, the Assessor's Office.

If I file an appeal do I still have to pay the property tax bill?

Yes. Filing an appeal does not exempt you from paying your property taxes as due because the assessment of your property is deemed correct until a change is made by the Assessment Appeals Board.

How do I file an Application for Changed Assessment?

An application must be filed, in writing with the Assessment Appeals Board at 1 Dr. Carlton B. Goodlett Pl., City Hall, Rm #405, San Francisco, CA 94102. You may request an application by calling the Assessment Appeals Board Clerk at 415-554-6778 or by mail at that address. The Assessment Appeals website is: sfgov.org/aab

When can I file an "Application for Changed Assessment"?

The normal filing period for filing an Application for Changed Assessment is July 2 to September 15th of the current fiscal year. The filing period applies to any assessment produced for the annual assessment roll. If a bill for an assessment roll is mailed to you after the normal filing period has expired, filing period is extended and you must then file an application within 60 days of the date of mailing of that tax bill.

Even if you file an appeal, you must still pay the bill by August 31st to avoid late payment penalties; a refund will be issued if the Assessment Appeals Board rules in your favor.

21. Is my Business Property Statement confidential?

Yes. By law, the Business Property Statement is a confidential document. It is not a public document and will be held confidential by the Assessor.

22. When is the lien date?

12:01 a. m., January 1st. (R & T 2192)

23. I was not open for business on January 1. Do I still have to complete the statement?

Yes. A business does not have to be open for its taxable personal property to be subject to assessment. For example, let's presume that on the lien date, January 1st, a new pizza parlor is under construction and nearly ready for its grand opening. Even though the pizza parlor was not open for business on the lien date, taxable business personal property (such as furniture, ovens and supplies) was in the owner's possession on the lien date and the Assessor is required to assess it.

24. I received a Notice from your office but I went out of business prior to January 1. Do I still have to complete the statement?

Yes, you need to notify our office the closure of your business. Please use your notice to find your Account Number and PIN to send customer request for closure with explanation at our taxpayer portal, as provided on the notice. Otherwise, please email us at askbpp@sfgov.org or call (415) 554-5531.

25. I went out of business after January 1. Do I need to complete the Business Property Statement?

Yes. The law specifies that all taxable personal property must be assessed as of 12:01 A.M. January 1st (regardless of what transpires after that date). Even if closed shortly after the lien date (January 1st), a business must still file a Business Property Statement.

26. My business has moved to a new location within San Francisco City and County. Can I still e-file?

Yes, you need to notify our office the movement of your business. Please use your notice to find your Account Number and PIN to send customer request for closure with explanation at our taxpayer portal, as provided on the notice. Otherwise, please email us at askbpp@sfgov.org or call (415) 554-5531.

27. My business has moved to a new location outside of San Francisco City and County. Can I still e-file?

Yes, you need to notify our office the movement of your business. Please use your notice to find your Account Number and PIN to send customer request for closure with explanation at our taxpayer portal, as provided on the notice. Otherwise, please email us at askbpp@sfgov.org or call (415) 554-5531.

28. Are non-profit organizations required to file the Business Property Statement?

Yes, the filing laws apply to non-profit organizations. Please use your notice to find your Account Number and PIN and refer to Exemptions on our taxpayer portal, as provided on the notice. Otherwise, please contact (415) 554-5596 and ask for the Exemptions Division of the Assessor's Office.

29. What is a supply item?

Any items that are used in the normal operation of the business and are not intended for sale or lease on the lien date. Examples of assessable supply items include stationery and office supplies, chemicals, precious metals used to produce a chemical or physical reaction, janitorial and lavatory supplies, fuel, and sandpaper. If you are a manufacturer, supplies do not include anything that becomes part of the finished product. You should report the cost of the supplies on hand, recorded during a physical inventory, as of 12:01 a.m., January 1st. An estimated cost can be used if physical inventory is not available.

30. How do I report disposals?

If you disposed business personal property before 12:01 a.m., January 1st, exclude the original cost of the disposed property from its year of acquisition. If you disposed leasehold improvement, structure or fixture, you should also exclude the original cost of the disposed improvement from its year of acquisition. In this case, you should also complete the 'Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B. Information on the disposed improvements should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc.), and name and addresses of the purchasers when items are either sold or transferred.

31. Is there any property that is exempt or that I do not have to report on my Business Property Statement?

The following are some common exempt items that should not be reported: Business Inventory ([Revenue & Taxation Code 129](#)) and Application Software ([Property Tax Rule 152](#)) and Licensed Motor Vehicles ([R&T Code 10751](#)) and First \$50,000 of Employee-owned Hand Tools ([R&T Code 241](#)).

Short Term Rentals (571-STR)

1. What is the 571-STR form and why did I receive it? The 571-STR is a State of California tax form required to be completed by rental businesses, including Short-Term Rental businesses. You received this form because as of January 1, , you were a registered business with the City and County of San Francisco, or it became known to our office that you are engaging in property rental activity. Rental of all or a portion of your property, including a residential unit, *means that you are subject to business property tax assessment on furnishings, including furniture, appliances, equipment, and supplies used in the rental activity.* The California Revenue and Taxation Code Section 441(a) requires business owners with personal property of less than \$100,000 in value to file a property statement (i.e., Form 571-STR) upon the Assessor-Recorder's request.

2. Why are you taxing my furnishings in my Short-Term Rental, including my furniture? Under the State Constitution, all property is subject to property tax unless otherwise exempt. In California, numerous types of property are subject to taxation. The most common property subject to taxation is real property, usually thought of as land and improvements or buildings. *A second type of taxable property is business personal property, which is property used to operate a business, (a short-term rental is considered a registered business), excluding land and improvements. For example, items such as furnishings, includes furniture, kitchen appliances, and washing/drying machines in rentals are considered business personal property.* For more information on the taxation of business property, please go to www.sfassessor.org and click on the button titled "Business Property."

3. I never received this before, why am I receiving this now, and why must I file by May 7, ? Property used in all businesses, including short-term residential rental businesses, is subject to property tax unless an exemption applies. *You received a notice to file a 571-STR form because your taxable business is registered with the City and County of San Francisco. The Form 571-STR is due on April 1, . The last day to file without incurring a penalty is May 7, ; the penalty for filing after May 7, is 10% of the total assessed value.*

4. What do I need to report on the 571-STR form? You are required to report the cost and acquisition year of all physical assets used in the rental activity. *This includes, but is not limited to, the cost and acquisition year of each piece of furniture, equipment, and supplies used in renting your residence, including furnishings from the kitchen, living room, dining room, and bedroom, such as televisions, computers, bed frames, mattresses, tables, chairs, stoves, fridges, appliances, dish washers, clothes washers and dryers, entertainment units, artwork, and any other property that you provide to your renters as part of the rental activity.*

5. How is the taxable assessed value determined, including \$7,500 estimated basis used for valuation of a 1 bedroom apartment? Business property is assessed each year. The assessed value of business property is based on the cost of the asset, which includes but not limited to sales tax, freight and installation. The Assessor-Recorder applies a State Board of Equalization valuation factor to the asset cost to determine the assessed value, while taking into account depreciation. *To establish a uniform assessment baseline citywide, the Assessor-Recorder researched the approximate costs of personal property and furnishings of a typical 1 bedroom apartment in the City and County of San Francisco, and estimated an assessed personal property value of \$7,500 for Short-Term Rental taxable furnishings, for which this \$7,500 value is used as the basis when such required filings are not received by due date.* The State Board of Equalization provides a valuation

schedule based on the expected economic life of different assets that informs the depreciation. For short-term rental business failed to file their Form 571-STR before May 8, the baseline value is applied with penalty and necessary adjustments. The assessed value is used to determine the tax due by multiplying the assessed value by the applicable tax rate. Visit our website for current information on the tax rate and when tax bills be received, <https://www.sfassessor.org/property-information/business-owners/about-business-property-assessments>

6. I did not buy new furniture for the rental room(s). I used old furniture from my house. How do I report the cost? Use your best knowledge to estimate the year each item was purchased, and your total cost (including sales tax, freight, and installation).

7. The furniture in the rental room is old. Can I report that it has zero value? No. You are required to report the original acquisition cost and acquisition year of the assets even if they are old. If you don't know the acquisition cost and year, use your best knowledge to estimate the year each item was purchased, and your total cost (including sales tax, freight, and installation).

8. I only rent out my residence on a part time basis, or sometimes only 1 room of my residence. Do I need to file the 571-STR form? Yes. You are required to file the 571-STR form if you are engaged in any rental activity. You are also required to report property within the rented room, and any property in other rooms (e.g., bathroom, kitchen, living room, laundry room) that your guests are permitted to use.

9. I registered with the Office of Short-Term Rental and as a business with the Office of the Treasurer-Tax Collector, but I have not rented my residence at all. Do I need to file the 571-STR form? Yes. As long as either registration was active as of January 1, , you are required to file the 571-STR form.

10. I discontinued my rental business prior to January 1, . Do I need to file the 571-STR form? You are required to respond to the notice using the 571-STR form to indicate the dates that your rental business was active and the date of closure with your signature and date by the filing deadline. Please use your notice to find your Account Number and PIN to send customer request for closure with explanation at our taxpayer portal, as provided on the notice. Otherwise, please email us at askbpp@sfgov.org or call (415) 554-5531. In addition, you must close your business account with the Office of the Treasurer-Tax Collector. Please also notify the Office of Short-Term Rental: (415) 575-9179 or shorttermrentals@sfgov.org.

APARTMENTS (571-R)

Why are you taxing my business assets?

The State Constitution states that all property is subject to property tax unless otherwise exempt. Homeowners are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation, includes apartment business personal property.

What is Business Personal Property?

Business Personal Property is any tangible property owned, claimed, used, possessed, managed, or controlled in the conduct of a trade or business. In general, business personal property is all property owned or leased by a business except licensed vehicles, business inventory, intangible assets, or application software. This includes apartment fixtures, furniture and furnishings, appliances and equipment, and related supplies.

How is the assessed value determined?

Assessment begins with an analysis of the cost of the asset, including sales tax, as well as the freight and installation costs. The Assessor applies a valuation factor to the asset cost to arrive at the assessed value. The valuation factor is based on the expected economic life of the asset and is different from the depreciation schedule used by Internal Revenue Service, Franchise Tax Board, and tax accountants.

What is the tax rate and when will my bill be received?

Visit our website for current information on the tax rate and when tax bills be received,

<https://www.sfassessor.org/property-information/business-owners/about-business-property-assessments>

Is my Apartment House Property Statement confidential?

Yes, by law the 571-R Apartment House Property Statement is a confidential document. It is not a public document and will be held confidential by the Assessor.

If the Apartment House Property Statement is not filed, how will my business' assessed value be determined?

If you do not file a Form 571-R Apartment House Property Statement, the Assessor's Office, directed by state law, will determine an assessable value. In addition, a 10% penalty for failure to file will be added to your assessment.

How can I receive a copy of my prior year's valuation?

Email us at askbpp@sfgov.org to request for a copy of prior year's valuation. If you are an agent of a taxpayer, we require authorization from the business owner.

I closed or sold my property before January 1, . Do I still need to file the Apartment House Property Statement?

Yes. Anytime a person receives a statement from the Assessor and their business is no longer in operation, the statement must still be signed and returned to the Assessor. Make a notation on the statement that the business has closed and note the closing date. Please indicate name and mailing address of new owner, sign the front page, and return form to Office of the Assessor-Recorder, Business Personal Property Division, 1155 Market Street, 5th Floor, San Francisco, CA 94103.



Contact Information

VI

VI. CONTACT INFORMATION

Please feel free to contact our office using the information below. You may ask for an auditor on duty who will be able to answer your questions.

Address: **Office of the Assessor-Recorder**
Business Personal Property Division
1155 Market Street, 5th Fl.
San Francisco, CA 94103

Telephone: (415) 554-5531

Fax: (415) 554-5544

Email: askbpp@sfgov.org

Hours: Monday thru Friday
8:00 A.M. to 5:00 P.M.
Excluding legal holidays



Appendix

VII

VII. APPENDIX

Form 571-L Business Property Statement

Form 571-D Supplemental Schedule

Form 571-L Alternate Schedule A (for Bank, Insurance Company, or Financial Corporation Fixtures)

Form 571-R Apartment House Property Statement

Form 571-STR Short-Term Rental Property Statement

Request for Address and Other Changes Form

Request for Copies of Property Statements (Form 571-L) and Other Documents Form

FORM 571-L BUSINESS PROPERTY STATEMENT

FORM 571-L

CARMEN CHU, ASSESSOR-RECORDER
BUSINESS PROPERTY STATEMENT
 CITY & COUNTY OF SAN FRANCISCO

1155 Market St., 5th Floor, San Francisco, CA 94103 • askbpp@sfgo.org • www.sfassessor.org

2018

RETURN THIS ORIGINAL FORM.
 COPIES WILL NOT BE ACCEPTED.
 FILE RETURN BY APRIL 2, 2018

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION
 AS OF 12:01 A.M., JANUARY 1, 2018

ACCOUNT NUMBER	LA BY	LOCATION OF RECORDS	ROLL CODE	ROUTING	VOL BLK LOT
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NAME AND MAILING ADDRESS
 (Make necessary corrections to the printed name and mailing address)

LOCATION OF THE BUSINESS PROPERTY
 (File a separate statement for each location)

PART I: GENERAL INFORMATION

COMPLETE (a) THRU (g)

a. Enter type of business: _____

b. Enter local telephone number () _____ FAX number () _____
 E-Mail Address _____

c. Do you own the land at this business location? ☐ Yes ☐ No
 If yes, is the name on your deed recorded as shown on this statement? ☐ Yes ☐ No

d. When did you start business at this location? DATE: _____
 If your business name or location has changed from last year, enter the former name and/or location: _____

e. Enter location of general ledger and all related accounting records (include zip code): _____

f. Enter name and telephone number of authorized person to contact at location of accounting records: _____

g. During the period of January 1, 2017, through December 31, 2017
 (1) Did any individual legal entity (corporation, partnership, limited liability company, etc.) acquire a "control" interest (see instructions for definition) in this business property? ☐ Yes ☐ No
 (2) If yes, did this business entity also own "real property" (see instructions for definition) in California at time of acquisition? ☐ Yes ☐ No
 If YES to either questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.

PART II: DECLARATION OF PROPERTY BELONGING TO YOU

(attach schedule for any adjustment to cost)

1.	Supplies	2.	Equipment	3.	Equipment out on lease, rent, or conditional sale to other (attach schedule)	4.	Bldgs., Bldg. Impr., and/or Leasehold Impr., Land Impr., Land (From line 71)	5.	Construction in Progress (Attach Schedule)	6.	Alternate Schedule A (See instructions)	7.		8.	

PART III: DECLARATION OF PROPERTY BELONGING TO OTHERS - IF NONE WRITE "NONE"

Report conditional sales contracts that are not leases on Schedule A (SPECIFY TYPE BY CODE NUMBER)

1.	Leased equipment	4.	Vending equipment	Year Of Acq.	Year Of Mfr.	Description and Lease or Identification Number	Cost to Purchase New	Annual Rent
2.	Lease-purchase option equipment	5.	Other businesses					
3.	Capitalized leased equipment	6.	Government-owned property					

Tax Obligation: A. Lessor B. Lessee

9. Lessor's name _____
 Mailing address _____

10. Lessor's name _____
 Mailing address _____

OWNERSHIP TYPE (✓)

Proprietorship ☐

Partnership ☐

Corporation ☐

Other ☐

DECLARATION BY ASSESSEE

NOTE: The following declaration must be completed and signed. If you do not do so, it may result in penalties.
 I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2018.

SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT* _____ DATE _____

NAME OF ASSESSEE OR AUTHORIZED AGENT* (typed or printed) _____ TITLE _____

NAME OF LEGAL ENTITY (other than DBA) (typed or printed) _____ FEDERAL EMPLOYER ID NUMBER _____

PREPARER'S NAME AND ADDRESS (typed or printed) _____ TELEPHONE NUMBER () _____ TITLE _____

*Agent: See Declaration by Assessee instructions.

THIS STATEMENT SUBJECT TO AUDIT
 INFORMATION PROVIDED ON A PROPERTY STATEMENT MAY BE SHARED WITH THE STATE BOARD OF EQUALIZATION

SCHEDULE A — COST DETAIL: EQUIPMENT (Do not include property reported in Part III.)

Include expensed equipment and fully depreciated items. Include sales or use tax (see instructions for important use tax information), freight and installation costs. Attach schedules as needed. Lines 18, 32, 33, and 45 "Prior" — Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	1. MACHINERY AND EQUIPMENT FOR INDUSTRY, PROFESSION, OR TRADE (do not include licensed vehicles)				2. OFFICE FURNITURE AND EQUIPMENT		3. OTHER EQUIPMENT (describe)		Calendar Year of Acq.	4. TOOLS, MOLDS, DIES, JIGS	
		COST	ASSESSOR'S USE ONLY			COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY		COST	ASSESSOR'S USE ONLY
11	2017									2017		
12	2016									2016		
13	2015									2015		
14	2014									2014		
15	2013									2013		
16	2012									2012		
17	2011									2011		
18	2010									Prior		
19	2009									Total		
20	2008											
21	2007									5a. PERSONAL COMPUTERS		
22	2006									COST	ASSESSOR'S USE ONLY	
23	2005									2017		
24	2004									2016		
25	2003									2015		
26	2002									2014		
27	2001									2013		
28	2000									2012		
29	1999									2011		
30	1998									2010		
31	1997									2009		
32	1996									Prior		
33	Prior									Total		
34	Total											
35	Add TOTALS on lines 19, 33, 34, 46 and any additional schedules. ENTER HERE AND ON PART II, LINE 2									5b. LOCAL AREA NETWORK (LAN) EQUIPMENT AND MAINFRAMES		
36	ASSESSOR'S USE ONLY									COST	ASSESSOR'S USE ONLY	
37	CLASSIFICATION	COL	FULL VALUE BASE	FULL VALUE	PERS. PROP. RCLND	PERS. PROP. ADJUSTMENT	PERS. PROP. FULL VALUE			2017		
38	Machinery & equipment	1								2016		
39	Office furniture & equipment	2								2015		
40	Tools, molds, dies & jigs	4								2014		
41	Personal Computers	5a								2013		
42	LAN and Mainframe	5b								2012		
43										2011		
44	Other equipment	3								2010		
45	Schedule B — Fixtures	—								2009		
46	TOTALS									Prior		
										Total		

SCHEDULE B — COST DETAIL: BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS, LAND IMPROVEMENTS, LAND AND LAND DEVELOPMENT

Attach schedules as needed. Line 69 "Prior"— Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS				3. LAND IMPROVEMENTS (e.g., blacktop, curbs, fences)		4. LAND AND LAND DEVELOPMENT (e.g., fill, grading)	
		1. STRUCTURE ITEMS ONLY (see instructions)		2. FIXTURES ONLY (see instructions)		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY
		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY				
47	2017								
48	2016								
49	2015								
50	2014								
51	2013								
52	2012								
53	2011								
54	2010								
55	2009								
56	2008								
57	2007								
58	2006								
59	2005								
60	2004								
61	2003								
62	2002								
63	2001								
64	2000								
65	1999								
66	1998								
67	1997								
68	1996								
69	Prior								
70	Total								
71	Add TOTALS on line 70 and any additional schedules. ENTER HERE AND ON PART II, LINE 4								
72	Have you received allowances for tenant improvements for the current reporting period that are not reported above? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes indicate amount \$								

REMARKS:

[illegible]

[illegible]

REMARKS:

FORM 571-L ALTERNATE SCHEDULE A

For Bank, Insurance Company, or Financial Corporation Fixtures

BOE-571-LA (P1) REV. 21 (06-17)

ALTERNATE SCHEDULE A FOR BANK, INSURANCE COMPANY, OR FINANCIAL CORPORATION FIXTURES

Name _____ Location _____ Corporation No. _____

Include expensed equipment and fully depreciated items. Include sales or use tax, freight and installation costs. Attach schedules as needed. Line 95 "Prior" — Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	1. COUNTERLINES, PARTITIONS, CAFETERIA EQUIPMENT, ETC.		2. SIGNS, CAMERAS, TV EQUIPMENT, ETC.		Enter Code (C) or (DR)	3. CARPETS (C), DRAPES (DR)		4. ATMs (Do not include free standing or counter-top units)	
		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY
73	2017									
74	2016									
75	2015									
76	2014									
77	2013									
78	2012									
79	2011									
80	2010									
81	2009									
82	2008									
83	2007									
84	2006									
85	2005									
86	2004									
87	2003									
88	2002									
89	2001									
90	2000									
91	1999									
92	1998									
93	1997									
94	1996									
95	Prior									
96	Total									
97	Add TOTALS on lines 96, 103, and any additional schedules. ENTER HERE AND ON (P1), PART II, LINE 6									

LINE NO	Enter Year of Acq.	Enter Code (V) or (N)	5. VAULT DOORS (V) AND NIGHT DEPOSITORIES (N)		Enter Year of Acq.	Enter Code (D) (W) or (K)	6. DRIVE-UP WINDOWS (D) WALK-UP WINDOWS (W) AND KIOSKS (K)		ASSESSOR'S USE ONLY		
			COST	ASSESSOR'S USE ONLY			COST	ASSESSOR'S USE ONLY	CLASSIFICATION	MARKET VALUE	ADJUSTED BASE YEAR VALUE
98											
99											
100											
101											
102											
103	TOTAL				TOTAL				TOTALS		

REMARKS: _____

THIS STATEMENT SUBJECT TO AUDIT

**INSTRUCTIONS FOR COMPLETING ALTERNATE SCHEDULE A FOR BANK, INSURANCE COMPANY,
OR FINANCIAL CORPORATION FIXTURES**

This schedule is applicable **ONLY** to: (1) banks and financial corporations that are subject to taxation under the provisions of section 23181 et seq. of the Revenue and Taxation Code; and (2) insurance companies that are subject to taxation under the provisions of section 28 of Article XIII of the California Constitution. If the assessee named on this statement is not a bank, financial corporation, or insurance company as defined in the preceding sentence, so indicate in the "Remarks" section and **do not** complete this schedule. Complete BOE-571-L, *Business Property Statement*, and return it and this schedule to the Assessor.

If the assessee named on this statement is a bank, financial corporation, or insurance company as defined above, complete entire BOE-571-L, **except do not complete Schedule A or Column 2 of Schedule B of that statement**. This supplemental schedule must be completed in lieu of Schedule A and Column 2 of Schedule B and submitted with BOE-571-L.

NAME and LOCATION. Enter the OWNER NAME and LOCATION OF THE PROPERTY as indicated on the front of BOE-571-L.

CORPORATION NUMBER. Enter the corporate number issued by the California Secretary of State. If this number has not been issued, enter the equivalent number issued by the Franchise Tax Board.

FIXTURES. Under the California law, personal property owned by a bank or financial corporation, and personal property owned by an insurance company, are exempt from property tax assessment. However, fixtures are taxable and must be reported on this schedule. Report the cost of your fixtures by calendar year of acquisition in the column that best describes the fixtures. Total the reported costs and enter the total on (P1), line 6, of BOE-571-L.

Do not include building costs which are reported in Column 1 of Schedule B of BOE-571-L.

To facilitate your reporting, below is a list of typical fixtures. Note that some items may be capitalized as personal property on your records, but must be reported as fixtures on this schedule. If additional information is needed, please contact the Assessor's Office cited on the face of BOE-571-L.

COLUMNS 3, 5, and 6. Report separately each item's cost, year of acquisition, and descriptive code ("C" for Carpets, "DR" for Drapes, "V" for Vault Door, "N" for Night Deposit, "D" for Drive-up Window, "W" for Walk-up Window, and "K" for Kiosk.) If carpets and drapes were acquired in the same year, please attach a separate schedule listing the year of acquisition and the individual costs.

COLUMN 4. ATMs that are installed as free standing or counter-top units within a building are classified as personal property. ATMs installed in a structure built primarily for the purpose of housing the ATMs, or an ATM installed through the wall of a building, is classified as a fixture. (See Property Tax Rule 122.5(e)(9) and Assessor's Handbook Section 504, page 18.)

REFERENCE LIST

LIST OF TYPICAL FIXTURES TO BE REPORTED IN COLUMN 1

Auditorium equipment (seating-stage and lighting-sound-projection)
Conveyors
Counters (include teller lines and railings)
Interior railings (not safety railings-staircase or mezzanine)
Man traps
Permanently attached partitions (less than ceiling heights)
Power panels, plumbing, and wiring for computers
Restaurant and cafeteria equipment including plumbing
Safe-deposit booths (partitions)
Shelving (attached or built-in)
Vault alarm systems
Vault ventilator
Wall-hung desks and built-in desks

LIST OF TYPICAL FIXTURES TO BE REPORTED IN COLUMN 2

Auxiliary or standby power generation equipment and ride through generators
Burglar alarms
Cameras (surveillance) attached to walls or columns
Closed circuit television systems
Electronic security or surveillance equipment
Music and security paging systems
Signs
Standby air conditioning for computers
Telephone systems equipment if permanently annexed to real property
Trash compactors and paper shredders
Vacuum air tube systems and compressors

FORM 571-R APARTMENT HOUSE PROPERTY STATEMENT

FORM 571-R

**CARMEN CHU, ASSESSOR-RECORDER
APARTMENT HOUSE PROPERTY STATEMENT
CITY & COUNTY OF SAN FRANCISCO**

1155 Market St., 5th Floor, San Francisco, CA 94103 • eskbop@sf.gov • www.sfassessor.org

2018

RETURN THIS ORIGINAL FORM.
COPIES WILL NOT BE ACCEPTED.
FILE RETURN BY APRIL 2, 2018

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION
AS OF 12:01 A.M., JANUARY 1, 2018

ACCOUNT NUMBER	LA BY	BLK LOT
----------------	-------	---------

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)

Local Telephone Number () Fax Number ()

E-Mail Address

Enter location of general ledger and all related accounting records (include zip code):

STREET	CITY	STATE	ZIP
--------	------	-------	-----

Enter name and telephone number of authorized person to contact at location of accounting records:

CAREFULLY READ AND FOLLOW THE ACCOMPANYING INSTRUCTIONS.

1. If you no longer own this property as of January 1 of this year, show the name and address of the previous owner:

Name

Mailing Address

City and State

2. Enter the total number of units for the location listed.

Do you live in one of the units?
☐ Yes ☐ No

If yes, enter the unit number

During the period of January 1, 2017 through December 31, 2017:

(1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity?
☐ Yes ☐ No

(2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of acquisition?
☐ Yes ☐ No

(3) If YES to both questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.

4. Do any other individuals, partnerships or corporations do business or own personal property (other than household furniture and personal effects of your tenants) located on your premises? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list below.							ASSESSOR'S USE ONLY
NAME AND ADDRESS OF OWNER OF SUCH PROPERTY				NATURE OF THE BUSINESS OR PROPERTY			
5. Do you hold furniture or equipment belonging to others on a loan, rental, or lease basis? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list below.							FXT PPT
NAME AND ADDRESS OF OWNER OF SUCH PROPERTY				QUANTITY AND DESCRIPTION			
6. ENTER BELOW the number of fully furnished, partly furnished (e.g., stoves and refrigerators, not built-in), and unfurnished units. Also complete Schedule A of the back. Do not include, either here or in Schedule A, any unit in which you live.							
	SLP. ROOM	STUDIO	1 BEDRM.	2 BEDRM.	3 BEDRM.	LARGER	
FULLY FURNISHED							
PARTLY FURNISHED							
UNFURNISHED							
TOTALS							
7. Supplies							Cost \$
8. Furniture and appliances							Enter From Schedule A \$
9. Other furniture and equipment							Enter From Schedule B \$
10.							
						TOTAL FULL VALUE	
						PERSONAL PROPERTY	
						FIXTURES	
						OTHER IMPROVEMENTS	
						LAND	

THIS STATEMENT SUBJECT TO AUDIT

SCHEDULES OF DEPRECIABLE PROPERTY-SCHEDULES A and B. Items may be listed separately within the year of acquisition on a separate schedule, or items may be grouped by year of acquisition and listed on the schedules below. If you purchased the property as a unit, report on Schedule A & B the previous owner's original cost by the original year of acquisition of the furniture and equipment that was included in your purchase.

Enter the total installed cost including freight, excise taxes, and sales and use taxes of all furniture, and other equipment located on the premises. Include fully depreciated items. Do not include licensed vehicles. Depreciation schedules may be attached if they provide the desired information.

SCHEDULE A				SCHEDULE B			
FURNITURE AND APPLIANCES (include items in storage; do not include built-ins)				OTHER FURNITURE AND EQUIPMENT (office, lobby, laundry, pool, vending, signs, fire extinguishers)			
Year of Acquisition	Original Installed Cost (NOT depreciated book value)	FOR ASSESSOR'S USE ONLY		Year of Acquisition	Original Installed Cost (NOT depreciated book value)	FOR ASSESSOR'S USE ONLY	
		Factor	Value			Factor	Value
2017				2017			
2016				2016			
2015				2015			
2014				2014			
2013				2013			
2012				2012			
2011				2011			
2010				2010			
2009				2009			
2008				2008			
2007 & prior				2007			
TOTAL COST \$ _____ Enter on line 8, page 1.				TOTAL COST \$ _____ Enter on line 9, page 1.			

REMARKS:

DECLARATION BY ASSESSEE

Note: The following declaration must be completed and signed. If you do not do so, it may result in penalties.

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the assessee in this statement at 12:01 a.m. on January 1, 2018.

OWNERSHIP TYPE (✓)	SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT*		DATE
	NAME OF ASSESSEE OR AUTHORIZED AGENT* (typed or printed)		TITLE
	NAME OF LEGAL ENTITY (other than DBA) (typed or printed)		FEDERAL EMPLOYER ID NUMBER
	PREPARER'S NAME AND ADDRESS (typed or printed)	TELEPHONE NO. ()	TITLE

*Agent: See page 3 for Declaration by Assessee instructions.

FORM 571-STR SHORT-TERM RENTAL PROPERTY STATEMENT

FORM 571-STR

**CARMEN CHU, ASSESSOR-RECORDER
SHORT TERM RENTAL PROPERTY STATEMENT
CITY & COUNTY OF SAN FRANCISCO**

1155 Market St., 5th Floor, San Francisco, CA 94103 • askbop@sfgov.org • www.sfassessor.org

2018

RETURN THIS ORIGINAL FORM.
COPIES WILL NOT BE ACCEPTED.
FILE RETURN BY APRIL 2, 2018

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION
AS OF 12:01 A.M., JANUARY 1, 2018

ASSESSOR'S USE ONLY ACCOUNT NUMBER	ASSESSOR'S USE ONLY ROLL	ASSESSOR'S USE ONLY APN
---------------------------------------	-----------------------------	----------------------------

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)



LOCATION ADDRESS OF THE PROPERTY (street, city)
(Separate statement for each location)

PART 1: GENERAL INFORMATION

Local Telephone Number () _____ Fax Number () _____
E-Mail Address _____
Enter location of general ledger and all related accounting records (include zip code):
STREET _____ CITY _____ STATE _____ ZIP _____

PART 2: PROPERTY

- 3a. Do you own the land used at this short term rental property location? ☐ Yes ☐ No
If Yes, is the name on your deed recorded as shown on this statement? ☐ Yes ☐ No
3b. Do you own the personal property (e.g., household furniture and personal effects) located at your short term rental property location?
☐ Yes ☐ No If NO, list below NAME AND ADDRESS OF OWNER AND DESCRIPTION OF SUCH PROPERTY

PART 3: DECLARATION OF PERSONAL PROPERTY BELONGING TO YOU [use Schedule A on page 2 to complete totals below.]

4. Supplies	Enter cost estimate of supplies consumed by rental guests	\$
5. Furniture & belongings	Enter total costs from page 2	\$
6. Kitchen Appliances	Enter total costs from page 2	\$
7. Other equipment	Enter total costs from page 2	\$
TOTAL PERSONAL PROPERTY		\$

ASSESSOR'S USE ONLY

Sign here

I declare under penalty of perjury under the laws of State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2018.

OWNER SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT	DATE
NAME OF ASSESSEE OR AUTHORIZED AGENT (typed or printed)	DATE
PREPARER'S NAME AND ADDRESS (typed or printed)	DATE

THIS STATEMENT SUBJECT TO AUDIT

SCHEDULE A - COST DETAIL: FURNITURE & EQUIPMENT**Table to itemize belongings**

Section 1(a) of article XIII of the California Constitution provides that all property is taxable unless otherwise exempted. Therefore, all home furnishings that are used in a short term rental property - including dishware, sofas, mattresses and bedding - are subject to personal property taxes.

One by one, please list EACH ITEM per room contained in the short term rental property and estimate cost and year that items were acquired.
For assistance, refer to Short Term Rental - Frequently Asked Questions at <http://www.sfassessor.org> or e-mail us at askbpps@sfgov.org or call us at 415.554.5531

Year acquired	Bedroom #1 furniture & belongings	Original cost	Year acquired	Living area furniture & belongings	Original cost	Year acquired	Kitchen appliances	Original cost
	Mattress			Sofa			Dishwasher	
	Box Spring			Chairs			Refrigerator	
	Bedframe			Rug			Stove	
	Pillows and bedding			TV			Microwave	
	Duvet cover / blanket			Table			Toaster	
	Bureau / chest of drawers			Storage chest of drawers			Coffee maker	
	Rug			Table lamp			Blender	
	Mirror			Floor lamp			Ice maker	
	Table lamp			Mirror			Other	
	Floor lamp			Artwork: painting/picture				
	Artwork: painting/picture			Clocks				
	TV			Other				
	Other							
	Total			Total			Total	
Year acquired	Bedroom #2 furniture & belongings	Original cost	Year acquired	Dining & kitchen furniture & belongings	Original cost	Year acquired	Other equipment	Original cost
	Mattress			Dishwasher			Clothes washer	
	Box Spring			Refrigerator			Clothes dryer	
	Bedframe			Stove			Vacuum cleaner	
	Pillows and bedding			Pots and pans			Computers	
	Duvet cover / blanket			Table			Bikes	
	Bureau / chest of drawers			Chairs			Sports equipment	
	Rug			Rug			Security systems	
	Mirror			Table lamp			Outdoor playground	
	Table lamp			Floor lamp			Patio furniture	
	Floor lamp			Mirror			Gazebo	
	Artwork: painting/picture			Artwork: painting/picture			Portable hot tub	
	TV			Clocks			Pool equipment	
	Other			Other			Other	
	Total			Total			Total	
Year acquired	Bedroom #3 furniture & belongings	Original cost	Year acquired	Bathroom furniture & belongings	Original cost	<p>Add up TOTAL COSTS for FURNITURE & BELONGINGS as listed in both the left and center columns and carry forward the total sum to the front page, line 5.</p> <p>Add up TOTAL COSTS for Appliances as listed in the upper right column and carry forward the total sum to the front page, line 6.</p> <p>Add up TOTAL COSTS for Equipment as listed in the mid right column and carry forward the total sum to the front page, line 7.</p>		
	Mattress			Bath towels				
	Box Spring			Hand towels				
	Bedframe			Other				
	Pillows and bedding							
	Duvet cover / blanket							
	Bureau / chest of drawers							
	Rug							
	Mirror							
	Table lamp							
	Floor lamp							
	Artwork: painting/picture							
	TV							
	Other							
	Total			Total				

REQUEST FOR ADDRESS AND OTHER CHANGES FORM

JOAQUÍN
TORRES ASSESSOR-
RECORDER



SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

Request for Business Account Update

Instructions: Complete and return this Form to the Office of the Assessor-Recorder to report changes to your business.

Business Information

Assessor's Account Number: _____ Today's Date: _____

Owner's Legal Name: _____
(Corporations must report their full corporate name.)

Business Name (DBA): _____

Business Account Number (BAN): _____
(From your business certificate provided to the Office of the Treasurer & Tax Collector.)

Business Account Update Information

Please check the appropriate box(es) below and provide the previous and new business information.

☐ **Change in Ownership** Effective Date: _____

Previous Owner's Legal Name: _____

New Owner's Legal Name: _____

From: ☐ Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Other: _____

To: ☐ Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Other: _____

Did your federal employer identification number change? ☐ Yes ☐ No

☐ **Business Name (DBA) Change** Effective Date: _____

Previous Name: _____ New Name: _____

☐ **Business Location Change** Effective Date: _____

Previous Location: _____

New Location: _____

☐ **Mailing Address Change** Effective Date: _____

Previous Address: _____

New Address: _____

Contact Information

Contact Name: _____ Title: _____

Phone Number: _____ Email Address: _____

I CERTIFY 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.

Signature

Printed Name

Date Signed

Business Personal Property: 1155 Market Street, 5th Floor
San Francisco, CA 94103
Tel: (415) 554-5531 Fax: (415) 554-5544
www.sfassessor.org
e-mail: askbpp@sfgov.org

REQUEST FOR COPIES OF PROPERTY STATEMENTS (FORM 571-L) AND OTHER DOCUMENTS FORM

CARMEN CHU
ASSESSOR-RECORDER



SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

Request for Copies of Property Statements (571-L) and Other Documents

Instructions: The Assessor's records are confidential in nature and requests require verification of the authorized signature. Therefore, please fill out this Form and include your account number, the owner's legal name, the DBA name, the mailing address, and the location of the property. Return this Form to the address, email, or fax number listed at the bottom of this Form. If you are an agent of a taxpayer, an authorization letter from the business owner is required to be submitted with this Form.

Business Information

Assessor's Account Number: _____ Business Account Number (BAN)*: _____
Owner's Legal Name: _____
(Corporations must report their full corporate name.)
Business Name (DBA): _____
Business Location: _____
Mailing Address: _____

Documents Requested

Please check the appropriate box(es) below to request documents:

- ☐ Copy of **current year** Business Property Statement (Form 571-L) for filing purposes.
- ☐ Copy of **prior year** Business Property Statement (Form 571-L) and valuation breakdown for years (please list):

- ☐ Copies of audit work papers for years (please list) : _____
- ☐ Other documents, please specify: _____

Remarks: _____

Requestor Information

Requested By: _____ Title: _____
Phone Number: _____ Email Address: _____

I CERTIFY 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.

Signature Printed Name Date Signed

**From your business certificate provided by the Office of the Treasurer & Tax Collector.*

Business Personal Property: 1155 Market Street, 5th Floor
San Francisco, CA 94103
Tel: (415) 554-5531 Fax: (415) 554-5544
www.sfassessor.org
e-mail: askbpp@sfgov.org