

**CARMEN CHU  
ASSESSOR-RECORDER**

**SAN FRANCISCO  
OFFICE OF THE ASSESSOR-RECORDER**



# **Form 571-L Business Property Statement Manual**

Prepared by:  
Business Personal Property  
1155 Market St., 5th Floor, San Francisco, CA 94103  
Tel: (415) 554-5531  
Fax: (415) 554-5544  
[www.sfassessor.org](http://www.sfassessor.org)  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

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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), (III) Filing a Form 571-L Paper Document, (IV) Filing through the Standard Data Record (SDR) System, (V) General Business Personal Property Frequently Asked Questions (FAQs), (VI) Contact Information, and (VII) 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 2016 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 1<sup>st</sup> 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 2016 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 2016 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](http://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 1<sup>st</sup> 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 31<sup>st</sup> of the previous calendar year. For example, if the lien date is January 1<sup>st</sup>, 2016, then you would report all personal property in your possession as of December 31<sup>st</sup>, 2015.

### **Why am I getting a Notice of Requirement to File 2016 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 1<sup>st</sup>, you received a Notice of Requirement to File 2016 Form 571-L and you are required by law to respond.

### **When are the filing deadlines?**

All property statements are due April 1<sup>st</sup> annually. The statements are accepted as timely filed until May 7<sup>th</sup> at 5:00 p.m. When mailed through the post office the forms are required to be postmarked May 7<sup>th</sup>. If May 7<sup>th</sup> falls on a Saturday, Sunday, or legal holiday, a property statement that is mailed and postmarked on the next business day shall be deemed to have been filed on May 7<sup>th</sup>. 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 7<sup>th</sup> deadline also applies.

### **What if I file after May 7<sup>th</sup>?**

May 7<sup>th</sup> 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 3885, 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's Office.



# **Filing a Form 571-L Electronically (e-File)**

**III**

## II. FILING A FORM 571-L ELECTRONICALLY (E-FILE)

The Assessor's Office is no longer mailing paper copies of the Form 571-L and attachments. Instead we are simplifying the process by providing you with an option to file directly online.

There are many benefits of e-Filing:

- E-File is a free online application that allows businesses to quickly and securely file the 2016 Form 571-L 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. 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 571-L statements are stored online, allowing businesses the ability to retrieve, view and print prior year e-Filed statements.

We mailed out several types of Notices, along with the assigned Account Number and Online PIN. By using the Account Number and PIN provided, you can meet your filing requirements by submitting a completed statement online or by downloading, printing, and returning a completed statement to our office. We strongly encourage you to file your Form 571-L electronically using e-File system.

The online portal ([www.sfassessor.org/efile](http://www.sfassessor.org/efile)) will begin accepting online statements beginning **Tuesday, February 16<sup>th</sup>, 2016**. When logging in, enter the Account Number and PIN. The Account Number and PIN are unique to your business and provides secure access to your statement, guards your confidential information and protects your privacy. Please remember that the PIN is case sensitive.

The PIN is only good for this year, 2016, and is non-transferable. If you have multiple business locations, but only received notices to file in some of the locations, please call our office at (415) 554-5531 for assignment of additional Account Number and PIN.

To retrieve your PIN, please go to the San Francisco County Assessor's e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on "FILE 2016 STATEMENT". Click "Forgot My Pin" at the bottom of Logon page. Enter your nine-digit account number without dashes, the five-digit mailing address zip code, and the two-digit month and four-digit year for when your business opened.

You may also send a written request, on company's letterhead with an authorized signature. Please include the Account number, ownership name, DBA, mailing address, and location of the property, to the Business Personal Property Division by fax (415) 554-5544, or e-mail as an attachment to [askbpp@sfgov.org](mailto:askbpp@sfgov.org). 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 want us to mail it to a different address, please indicate it on your written request. If you are an agent of a taxpayer, an authorization letter from the business owner is required.

For more information, please refer to the e-File Frequently Asked Questions (FAQs) section of this Manual. If you still have additional questions, please contact the Business Personal Property Division by sending an email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org).

Your 2016 Business Property Statement is due by April 1<sup>st</sup>, 2016. The last day to e-File without incurring a penalty is May 9<sup>th</sup>, 2016. The late filing penalty is 10% of the total assessed value.

## II (A). E-FILE USER'S GUIDE (INSTRUCTIONS FOR ELECTRONIC FILING)

This is a comprehensive user's guide on how to electronically file (e-File) the Form 571-L Business Property Statement. It includes a step-by-step instruction with sample screens. Although the actual screen will show information relating to your business, some data on the sample screens were blocked to maintain the confidentiality of certain businesses. *Additionally, some of the screens included are for 2015, but no changes have been made to those screens for the 2016 tax year.*

In February 2016, you received one of the following four Notices: (1) *Notice of Requirement to File 2016 Form 571-L Business Property Statement*, (2) *Notice to e-File 2016 Form 571-L Business Property Statement*, (3) *Direct Bill Notice*, or (4) *Low Value Exemption Notice*. You will use the Account Number and PIN printed on the Notice to access your business account online.

The minimum system requirements are as follows:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, mobile devices are **NOT** supported at this time.

- I. **FILE 2016 STATEMENT** - Go to the San Francisco County Assessor's e-Filing website, <http://www.sfassessor.org/efile>, and click on "[FILE 2016 STATEMENT](#)" (Fig. 1).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

[Home](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016



### Welcome to the County Assessor's e-File System!

Your business has been pre-selected for online filing of your 2016 Form 571-L Business Property Statement. There are two ways in which you can file your statement:

- 1) E-File Directly Online, or
- 2) Download, Print, Complete, Sign and Mail.

Click "FILE 2016 STATEMENT" to begin.

» [FILE 2016 STATEMENT](#)

**IMPORTANT DATES TO REMEMBER :**

- April 1 - Due Date for Form 571-L Business Property Statement.
  
- May 7 - Last Day to File  
**May 7, 2016 falls on a Saturday. Therefore, any property statement that is postmarked on the next business day (Monday, May 9) will be considered timely. Any statements postmarked after May 9 will have a 10% penalty assessed in accordance with Section 441(b) of the California Revenue and Taxation Code.**
  
- May 31 - Last Day to Use E-Filing System. Thereafter, this site will become unavailable for filing statements and you must file hardcopy. However, all statements filed electronically may still be viewed after this date.

[VIEW STATEMENT](#)

**IMPORTANT BROWSER REQUIREMENTS:**

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Note: Apple Safari, Google Chrome, or Mobile Devices are NOT supported at this time.
- Download latest supported version of Internet Explorer. [Click here](#)
- Download latest version of Mozilla FireFox. [Click here](#)
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Fig. 1

- II. **LOG ON** - Enter the Account Number and PIN provided on the Notice, and then click “Submit.” Do not use dashes or spaces when entering the Account Number. Note that the PIN is case sensitive. (Fig. 2)

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

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571-L Business Property Statement - 2016



## Logon

Please enter the nine-digit business Account # as it appears on the: 1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, or 2) Notice to e-File 2016 Form 571-L Business Property Statement, or 3) Direct Bill Notice, or 4) Low Value Exemption Notice. Then, enter the PIN#. Please note that the PIN # is case sensitive. For assistance click on "Help".

For Electronic Filing businesses, prior to submitting your filing, you may review and/or print a copy of your Form 571-L Business Property Statement. After filing, a confirmation number, date, and time will be provided for your records.

For Electronic Filing businesses, you do not have to complete your filing at one time. You may save your data at any time by clicking "Save". After logging in, if you feel additional information is necessary, please click and enter using the "Remarks" link at the top of any page.

Account #:  (Do not enter dashes or spaces.)

PIN:  (PIN is case sensitive.)

[Submit](#) [Reset](#) [Forgot My Pin](#)

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Fig. 2

**FORGOT MY PIN** - To retrieve your PIN, please click “Forgot My Pin” on Logon page (Fig. 2). Enter your nine-digit account number without dashes, the five digit mailing address zip code, and the two-digit month and four-digit year for when your business opened (Fig. 2.1).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

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571-L Business Property Statement - 2016



### Forgot My PIN

To retrieve your PIN, please enter your nine-digit account number without dashes, the five-digit mailing address zip code, and the two-digit month and four-digit year for when your business opened.

Account Number:	<input type="text"/>	(No spaces or dashes)
Mailing Address Zip Code:	<input type="text"/>	
Date your business opened:	mm: <input type="text"/>	yyy: <input type="text"/>

[Return To Login](#) | [Clear Form](#) | [Retrieve My PIN](#)

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Fig. 2.1

III. **ELECTRONIC FILING** - Click “Electronic Filing (E-File Directly Online)” to start the e-File process (Fig 3). If you have previously used the e-Filing process, you will be directed to the “Questionnaire” screen (Fig. 4).

**Carmen Chu**  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

[Log Off](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016 Company Number: XXXXXXXXXX



## Welcome

Please choose how you want to file.

**Electronic Filing** (E-File Directly Online)

- Accessible:** You can access your current and previous years filed statements anytime and anywhere there is an internet connection.
- Accurate:** Less mistakes in processing the return, because data is loaded electronically.
- Convenient:** The ability to 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 your 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 Form 571-L statement, and it is not a public document.

**File by Mail** (Download, Print, Complete, Sign and Mail)

Businesses that choose not to file electronically this year, MUST download, print, complete, sign and mail the Form 571-L statement. Our office will NOT be mailing you a hard copy statement

If you have any questions you may call (415) 554-5531 or send email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org).

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Fig. 3



## Questionnaire

Please check the boxes below that apply to you.

If you check any of the boxes on this page, and click the 'Submit' button, you will not be able to use our e-file system to file your Form 571-L. At this time, we are not able to accept electronic submissions for filers in any of the categories listed below, including filers that have no email address.

Note: We value your privacy and confidentiality. All of the information you provide us is **confidential**, including your email address. We do **not** share, sell, or in any way distribute your email address to any outside parties.

If you have any questions you may call (415) 554-5531 or send email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org).

- My business is a residential rental property such as an apartment house. (571-R).
- I have equipment out on lease to others.
- I am a bank or financial institution recognized by the State of California.
- I am an insurance company recognized by the State of California.
- I am a biotech company.
- I currently own or lease one or more billboards within San Francisco County.
- I do NOT have an email address. (You must have an email address to use our e-file system to file your 571-L.)

If your business has moved, closed, or was sold, please select one of the choices below.

- My business moved to another location **within** San Francisco County.
- My business moved to another location **outside** San Francisco County.
- My business closed.
- My business was sold.

[Submit](#) [Reset](#)

### IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Download latest supported version of Internet Explorer. [Click here](#)
- Download latest version of Mozilla FireFox. [Click here](#)
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

Fig. 4

**IV. QUESTIONNAIRE – Review if any of the boxes apply to your business. If any** of the boxes apply, check the appropriate box and click “Submit” (Fig. 4). Unfortunately, if you check any of the boxes, you **cannot** use our e-File system. You need to download and print hard copies of the Form 571-L Business property Statement. Please refer to III (A) File by Mail User’s Guide (Download, print, Complete, Sign & Mail). If none of the boxes apply to your business, click “Submit” to go to “Step 1 - Ownership Info.”

In the e-Filing process, there are five major steps: Step 1 - Ownership Information, Step 2 - General Information, Step 3 - Your Property, Step 4 - Other’s Property, and Step 5 - Certification. The highlighted tab indicates which step you are in. You can always go back to any step, if you need to make changes, by clicking the corresponding “**STEP**” tab, once required fields are completed. If you need to stop at any point, click “Save” and “Log Off” to exit the system.

**STEP 1 – Ownership Information** (Fig. 5)

Review the preprinted information and make necessary corrections; however, you cannot edit the “Owner Name” or “Location of Property” fields. To make a minor correction to the “Location of Property” such as change of street type or spelling of street name, click “Remarks” at the bottom of the page or at the top of the page in the dark blue bar. Enter your changes in the “Remarks” pop-up window, then click “Save” in the same window, and then click to close the pop-up window. You are required to update all the fields marked with a red asterisk (\*) before you can go to the next step. Click “Save”, then click “Next” to go to the next screen – “Step 2 - General Info”. (Fig. 6)

**CLOSED OR SOLD BUSINESS** – If your business moved, or was closed or sold, refer to II (B) – Business Moved/Closed/Sold.

**Carmen Chu**  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

Step 1  
Ownership Info
Step 2  
General Info
Step 3  
Your Property
Step 4  
Others' Property
Step 5  
Certification

[Log Off](#) | Remarks | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016
Company Number: XXXXXXXXXX | [View Form](#)

## Ownership Information

[Save](#) [Next](#)

Please review the information below and make all necessary corrections. All fields marked with an asterisk (\*) are required. Click "save" if you updated any field. Click "next" to save and proceed.

**Name (NOTE: If owned by a sole owner or partnership, the format should be last name first.)**

Owner Name 1: <input style="width: 90%;" type="text"/>	DBA: <input style="width: 90%;" type="text"/>
Owner Name 2: <input style="width: 90%;" type="text"/>	C/O: <input style="width: 90%;" type="text"/>
Email Address: * <input style="width: 95%;" type="text"/>	

**Mailing Address**

Street Number: <input style="width: 90%;" type="text"/>	Street Direction: <input style="width: 90%;" type="text"/>
Street Name/P.O.: * <input style="width: 90%;" type="text"/>	Street Type: <input style="width: 90%;" type="text"/>
Suite/Room: <input style="width: 90%;" type="text"/>	City: * <input style="width: 90%;" type="text"/>
State: * <input style="width: 90%;" type="text"/>	Zip: * <input style="width: 40%;" type="text"/> <input style="width: 40%;" type="text"/>
Country: * <input style="width: 95%;" type="text" value="United States"/>	

**Location of Property**

Street Number: <input style="width: 90%;" type="text"/>	Street Direction: <input style="width: 90%;" type="text"/>
Street Name: <input style="width: 90%;" type="text"/>	Street Type: <input style="width: 90%;" type="text"/>
Suite/Room: <input style="width: 90%;" type="text"/>	

To make minor corrections to the location of property (i.e. street spelling, St. to Ave., etc.), please indicate the changes in the remarks area.

[Save](#) [Next](#)

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Fig. 5

## STEP 2 – General Information

Update all the fields marked with a red asterisk (\*). These fields are required before you can go to the next step (Fig. 6). Click “Save”, then click “Next” to go to the next screen – “Step 3 - Your Property” (Fig. 7).

**Carmen Chu**  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

Step 1 | **Step 2** | Step 3 | Step 4 | Step 5  
Ownership Info | **General Info** | Your Property | Others' Property | Certification

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2016      Company Number: [REDACTED] | View Form



### General Information

[Previous](#) [Save](#) [Next](#)

Please answer the questions below. Once required fields have been completed, you may click "Next" or "Previous" to continue to the next/previous step. You may click "Save" to save your changes while remaining on this page. If you wish to return to Step 1 without saving your changes, simply click the "Step 1 Ownership Info" tab, at the top of this page.

All fields marked with an asterisk (\*) are required.

a) Type of Business:  \* (Please provide a detailed description.)

b) Local Telephone: (  )  -  Ext.#  \*

Local FAX: (  )  -

c) Do you own the land at this business location?  \*

If yes, is the name on your deed recorded as shown on this statement?  \*

d) When did you start your business at this location?  /  /  \* (mm/dd/yyyy) ?

If your business name or location has changed from last year, enter the former name and location:  
[View/Update Address](#)

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

f) Enter the name and telephone number of authorized person to contact at location of accounting records:  
[View/Update Address](#) \*

g) During the period of January 1, 2015 through December 31, 2015:

- 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?  
 \*
- 2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of the acquisition?  \*
- 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.

[Previous](#) [Save](#) [Next](#)

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Fig. 6

### **STEP 3 – Your Property**

The main screen of Step 3 is the “**Declaration of Property Belonging to You**”. This screen shows major business property categories: Supplies, Equipment, Buildings/Improvements, and Construction in Progress (Fig. 7). The Equipment and Buildings/Improvements categories are linked to sub-categories and cost detail screen. You can change the cost for each sub-category and create a new sub-category (refer to applicable instructions in succeeding pages).

*Additionally, some of the screens included are for 2015, but no changes have been made to those screens for the 2016 tax year.*

- **Supplies** – Enter the amount under “This Year’s Cost” (Fig. 7).
- **Equipment** – If you have any equipment to report, click “View/Update” in the Operation column. This will bring you to the “Schedule A: Equipment” screen (Fig. 8).
- **Buildings/Improvements** – If you have any leasehold improvement to report, click “View/Update” in the Operation column. This will bring you to the “Schedule B: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land and Land Development” screen (Fig. 12).
- **Construction in Progress** – If you have any construction in progress to report, click “View/Update” in the Operation column. This will bring you to the “Construction in Progress Cost Detail” screen (Fig. 19).

If you have nothing to report in this section, go to Step 4 - Other’s Property.

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

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**Declaration of Property Belonging to You**

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The categories below display the total costs you reported last year. If the cost of your supplies has changed, enter this year's cost and click "save". To change the reported cost for the other categories of property, click "View/Update".

**NOTE:** At this time, we are not able to accept electronic submissions for filers that have "Equipment out on Lease to Others".

**NOTE:** Enter numeric characters only. Omit commas and cents.

Category	Last Year's Cost	This Year's Cost	Operation
Supplies	300	300	
Equipment	15809	15809	<a href="#">View/Update</a>
Buildings/Improvements	0	2000	<a href="#">View/Update</a>
Construction in Progress	0	0	<a href="#">View/Update</a>

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Fig. 7

**Schedule A: Equipment**

Schedule A shows the following equipment sub-categories: Machinery and Equipment, Office Furniture and Equipment, Other Equipment, Tools, Personal Computers, and Local Area Network.

1. To change the cost for each sub-category, click “View/Update” under the “Operation” column. This will bring you to the “Schedule A Cost Detail” screen (refer to sample – Fig. 9).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

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### Schedule A: Equipment

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The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update." You may add commonly reported categories by selecting the category from the drop-down list and clicking "Create". For categories not listed, enter a category description and click "Create". This allows you to provide your description of the property.

Description	Last Year's Total	This Year's Total	Operation
Machinery & Equipment: MACHINERY & EQUIPMEN	6271162	6271162	<a href="#">View/Update</a>
Office Furn & Equip: OFFICE FURN & EQUIP	432052	432052	<a href="#">View/Update</a>
Other Equipment	0	0	<a href="#">View/Update</a>
OTHER EQUIPMENT: L/E Computer (PC)	4101885	4101885	<a href="#">View/Update</a>
Tools	0	0	<a href="#">View/Update</a>
Personal Computers: COMPUTER - PC	6049071	6049071	<a href="#">View/Update</a>
Local Area Network (LAN) Equipment & Mainframes: LOCAL AREA NETWORK	11669857	11669857	<a href="#">View/Update</a>
<b>Total</b>	<b>28524027</b>	<b>28524027</b>	

or Enter New Category:  [Create](#)

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Fig. 8

## SAMPLE OF COST DETAIL

Carmen Chu  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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### Schedule A Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

#### Machinery & Equipment: MACHINERY & EQUIPMEN

Year of Acq.	Last Year's Cost	This Year's Cost
2014	0	<input type="text" value="0"/>
2013	436731	<input type="text" value="436731"/>
2012	1071198	<input type="text" value="1071198"/>
2011	571485	<input type="text" value="571485"/>
2010	570246	<input type="text" value="570246"/>
2009	615277	<input type="text" value="615277"/>
2008	413926	<input type="text" value="413926"/>
2007	492092	<input type="text" value="492092"/>
2006	394473	<input type="text" value="394473"/>
2005	489091	<input type="text" value="489091"/>
2004	413969	<input type="text" value="413969"/>
2003	62758	<input type="text" value="62758"/>
2002	56118	<input type="text" value="56118"/>
2001	130985	<input type="text" value="130985"/>
2000	156857	<input type="text" value="156857"/>
1999	175166	<input type="text" value="175166"/>
1998	3805	<input type="text" value="3805"/>
1997	0	<input type="text" value="0"/>
1996	45146	<input type="text" value="45146"/>
1995	97931	<input type="text" value="97931"/>
1994	0	<input type="text" value="0"/>
1993	0	<input type="text" value="0"/>
Prior	73908	<input type="text" value="73908"/>
<b>Total</b>	<b>6271162</b>	<b>6271162</b>

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Fig. 9

- To create a new category, click “Select New Category” from the drop down menu at the bottom, or enter a new category on the blank field (Fig. 10). Click “Create” to add the new sub-category and to create a new cost detail screen (refer to sample of new cost detail screen – Fig. 11).

**Carmen Chu**  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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### Schedule A: Equipment

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The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update." You may add commonly reported categories by selecting the category from the drop-down list and clicking "Create". For categories not listed, enter a category description and click "Create". This allows you to provide your description of the property.

Description	Last Year's Total	This Year's Total	Operation
Machinery & Equipment: MACHINERY & EQUIPMEN	6271162	6271162	<a href="#">View/Update</a>
Office Furn & Equip: OFFICE FURN & EQUIP	432052	432052	<a href="#">View/Update</a>
Other Equipment	0	0	<a href="#">View/Update</a>
OTHER EQUIPMENT: L/E Computer (PC)	4101885	4101885	<a href="#">View/Update</a>
Tools	0	0	<a href="#">View/Update</a>
Personal Computers: COMPUTER - PC	6049071	6049071	<a href="#">View/Update</a>
Local Area Network (LAN) Equipment & Mainframes: LOCAL AREA NETWORK	11669857	11669857	<a href="#">View/Update</a>
<b>Total</b>	<b>28524027</b>	<b>28524027</b>	
<input type="text" value="Select New Category"/>	or Enter New Category: <input type="text" value="MEDICAL HIGH TE"/>		<a href="#">Create</a>

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Fig. 10

# SAMPLE OF NEW COST DETAIL

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 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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## Schedule A Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

**Other: MEDICAL HIGH TECH**

Year of Acq.	Last Year's Cost	This Year's Cost
2014	0	<input type="text" value="0"/>
2013	0	<input type="text" value="0"/>
2012	0	<input type="text" value="0"/>
2011	0	<input type="text" value="0"/>
2010	0	<input type="text" value="0"/>
2009	0	<input type="text" value="0"/>
2008	0	<input type="text" value="0"/>
2007	0	<input type="text" value="0"/>
2006	0	<input type="text" value="0"/>
2005	0	<input type="text" value="0"/>
2004	0	<input type="text" value="0"/>
2003	0	<input type="text" value="0"/>
2002	0	<input type="text" value="0"/>
2001	0	<input type="text" value="0"/>
2000	0	<input type="text" value="0"/>
1999	0	<input type="text" value="0"/>
1998	0	<input type="text" value="0"/>
1997	0	<input type="text" value="0"/>
1996	0	<input type="text" value="0"/>
1995	0	<input type="text" value="0"/>
1994	0	<input type="text" value="0"/>
1993	0	<input type="text" value="0"/>
Prior	0	<input type="text" value="0"/>
<b>Total</b>	<b>0</b>	<b>0</b>

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Fig.11

**Schedule B: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land and Land Development**

Schedule B shows the following sub-categories: Leasehold Improvements (LHI) - Structural, LHI - Fixtures, Land Improvements, and Land & Land Development (Fig. 12).

1. To add, delete or change the cost for each category, click “View/Update” under the “Operation” column. This will bring you to “Schedule B Cost Detail” screen (refer to sample – Fig. 13 & Fig. 16). You will not be able to enter a negative number. Click “Save.”
2. Any net change needs to be reported on **Schedule D**. Click the number shown under “Unreported Change” column (Fig. 13). This will bring you to “Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B” (Fig. 14 & 17). Enter the following information: Type, Month and Year of Addition or Disposal, Cost, Description, and Year Acquired. Click “Create” then click “Next” (Fig. 15 & 18).
3. **Tenant Allowances** (Fig. 12) - If you received allowances for tenant improvements, select “Yes” and indicate the amount. If you need to provide additional information regarding tenant improvements, click “Remarks”, enter the information and click “Save”.

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

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**Schedule B: Buildings, Building Improvements,  
and/or Leasehold Improvements, Land Improvements,  
Land and Land Development**

[Save](#)   [Back](#)

The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update". Also, please answer the question at the bottom of the page regarding any allowances received for tenant improvements.

Description	Last Year's Total	This Year's Total	Operation
LHI - STRUCTURAL	30450849	30800849	<a href="#">View/Update</a>
LHI - FIXTURES	5602281	5602281	<a href="#">View/Update</a>
LAND IMPROVEMENTS	2497538	2497538	<a href="#">View/Update</a>
LAND & LAND DEVELOPMENT	0	0	<a href="#">View/Update</a>
<b>Total</b>	<b>38550668</b>	<b>38900668</b>	

Have you received allowances for tenant improvements for the current reporting period that are not reported above?

If Yes, indicate amount:  \*

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Fig. 12

Carmen Chu  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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### Schedule B Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

If "This Year's Cost" is different than the "Last Year's Cost", then this difference will be calculated and displayed in the "Net Change" column. We request that this Net Change be accounted for in Schedule D. After saving your data, you may then account for each Net Change amount by clicking on the "Un-Reported Change" amount, which will then take you to the Schedule D page to account for this difference. The total Additions/Disposal amounts reported on Schedule D are also calculated and displayed on this page for each "Year of Acq". Please make every effort to account for the Net Change for each "Year of Acq", and report it in Schedule D.

**Unreported Variance Detected**

One or more rows reported below have a variance (Net Change) from Last Year's reported cost, which is not fully accounted for in Schedule D. Please make every effort to identify the cause for this variance and report it in Schedule D for each "Year of Acq". This can be done by clicking on the respective "Un-Reported Change" amount, which will allow you to account for the given Net Change for the specific "Year of Acq".

**LHI - STRUCTURAL**

Year of Acq.	Last Year's Cost	This Year's Cost	Net Change	Reported on Schedule D		
				Additions	Disposals	Unreported Change
2014	0	350000	350000			350000
2013	0	0				
2012	3795092	3795092				
2011	2789849	2789649				
2010	816803	816803				
2009	1694508	1694508				
2008	2401247	2401247				
2007	2352863	2352863				
2006	6508982	6506982				
2005	324431	324431				
2004	1008965	1008965				
2003	0	0				
2002	185140	185140				
2001	973270	973270				
2000	2121693	2121693				
1999	2242742	2242742				
1998	0	0				
1997	5775	5775				
1996	178919	178919				
1995	2063591	2063591				
1994	565587	565587				
1993	69442	69442				
Prior	354150	354150				
<b>Total</b>	<b>30450849</b>	<b>30800849</b>	<b>350000</b>	<b>0</b>	<b>0</b>	<b>350000</b>

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Fig. 13



## Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - STRUCTURAL](#) Acquired in 2014

Report all acquisitions and disposals reported for [LHI - STRUCTURAL](#) Acquired in 2014 on Schedule B for the period January 1, 2014 through December 31, 2014, complete the information as required below and click "Create".

**Additions:** Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2014 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

**Disposals:** Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

[Next](#)

Additions/Disposals For Category: <a href="#">LHI - STRUCTURAL</a> Acquired in 2014							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - STRUCTURAL	Addition	Jan	2014	350000	REMODEL RECEPTION AREA	2014	Create

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Fig. 14



### Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: **LHI - STRUCTURAL** Acquired in **2012**

Report all acquisitions and disposals reported for **LHI - STRUCTURAL** Acquired in **2012** on Schedule B for the period January 1, 2014 through December 31, 2014, complete the information as required below and click "Create".

**Additions:** Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2014 property statement. Describe the item(s) and cost(s) as previously reported, in the **Remarks** section of the eFile application.

**Disposals:** Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

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Additions/Disposals For Category: <b>LHI - STRUCTURAL</b> Acquired in <b>2012</b>							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - STRUCTURAL	Addition	Jan				2012	Create
LHI - STRUCTURAL	Disposal	Sep	2012	10000	MISCLASSIFIED ITEM	2012	Update Delete

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Fig. 15



### Schedule B Cost Detail

[Save](#) [Back](#)

The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

If "This Year's Cost" is different than the "Last Year's Cost", then this difference will be calculated and displayed in the "Net Change" column. We request that this Net Change be accounted for in Schedule D. After saving your data, you may then account for each Net Change amount by clicking on the "Un-Reported Change" amount, which will then take you to the Schedule D page to account for this difference. The total Additions/Disposal amounts reported on Schedule D are also calculated and displayed on this page for each "Year of Acq". Please make every effort to account for the Net Change for each "Year of Acq", and report it in Schedule D.

#### LHI - FIXTURES

Year of Acq.	Last Year's Cost	This Year's Cost	Net Change	Reported on Schedule D		
				Additions	Disposals	Unreported Change
2014	0	<input type="text" value="0"/>				
2013	369207	<input type="text" value="369207"/>				
2012	1897739	<input type="text" value="1897739"/>				
2011	433572	<input type="text" value="433572"/>				
2010	0	<input type="text" value="0"/>				
2009	44197	<input type="text" value="44197"/>				
2008	644766	<input type="text" value="644766"/>				
2007	850591	<input type="text" value="850591"/>				
2006	538226	<input type="text" value="538226"/>				
2005	14634	<input type="text" value="14634"/>				
2004	0	<input type="text" value="0"/>				
2003	0	<input type="text" value="0"/>				
2002	10700	<input type="text" value="10700"/>				
2001	151714	<input type="text" value="151714"/>				
2000	341909	<input type="text" value="341909"/>				
1999	305026	<input type="text" value="305026"/>				
1998	0	<input type="text" value="0"/>				
1997	0	<input type="text" value="0"/>				
1996	0	<input type="text" value="0"/>				
1995	0	<input type="text" value="0"/>				
1994	0	<input type="text" value="0"/>				
1993	0	<input type="text" value="0"/>				
Prior	0	<input type="text" value="0"/>				
<b>Total</b>	<b>5602281</b>	<b>5602281</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

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Fig. 16



## Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - FIXTURES](#) Acquired in 2014

Report all acquisitions and disposals reported for [LHI - FIXTURES](#) Acquired in 2014 on Schedule B for the period January 1, 2014 through December 31, 2014, complete the information as required below and click "Create".

**Additions:** Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2014 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

**Disposals:** Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

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Additions/Disposals For Category: <a href="#">LHI - FIXTURES</a> Acquired in 2014							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - FIXTURES	Addition	Jan				2014	Create

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Fig. 17

Carmen Chu  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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### Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - FIXTURES](#) Acquired in 2002

Report all acquisitions and disposals reported for [LHI - FIXTURES](#) Acquired in 2002 on Schedule B for the period January 1, 2014 through December 31, 2014, complete the information as required below and click "Create".

**Additions:** Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2014 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

**Disposals:** Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

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Additions/Disposals For Category: <a href="#">LHI - FIXTURES</a> Acquired in 2002							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - FIXTURES	Addition	Jan				2002	Create
LHI - FIXTURES	Disposal	Dec	2014	10000	REMOVE SHORT PARTITIONS	2002	Update Delete

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Fig. 18

**Construction in Progress**

Under “Construction in Progress Cost Detail” screen, fill out the following information: Year of Acquisition, Cost, and Description. Click “Save”, then click “Back” (Fig. 19).

Carmen Chu  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

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## Construction in Progress Cost Detail

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Below is the detail information by year for your assets. You may update the cost value for a given year by changing the value. You may create a new year by entering the year and cost in the create section. Click save to update your changes.

**Important: Please provide a detailed description. The Assessor's office must determine whether the construction is personal or real property. The detail will prevent any duplication of assessments.**

### Construction in Progress

Year of Acq.	Cost	Description
Update Section		
2012	3232349	CONSTRUCTION IN PROG
<b>Total</b>	<b>3232349</b>	
Create Section		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

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Fig. 19

## **STEP 4 – Other’s Property**

The main screen of Step 4 is the “**Declaration of Property Belonging to Others**” screen (Fig. 20); which shows three sub-categories: Leased Equipment, Vending Equipment, and Other Businesses. You can create, edit or delete a lessor, a vendor and/or other businesses.

If you have nothing to report for 2016 on step 4 and you did not report any leased equipment, vending equipment and other business in 2015, proceed to Step 5 - Certification, by clicking on the tab of the page.

The screenshot shows the 'Declaration of Property Belonging to Others' screen. At the top right, contact information for Carmen Chu, Assessor-Recorder, is provided. A navigation bar at the top contains five steps: Step 1 (Ownership Info), Step 2 (General Info), Step 3 (Your Property), Step 4 (Others' Property), and Step 5 (Certification). Below this, there are links for Log Off, Remarks, 571-L Instructions, and Help. The main header indicates '571-L Business Property Statement - 2015' and a 'Company Number' field with a redacted value and a 'View Form' link. The central heading is 'Declaration of Property Belonging to Others', with 'Previous' and 'Next' links. A instruction reads: 'Click "View/Update/Create" next to the category you want to report.' Below this is a table with two columns: 'Description' and 'Operation'. The table lists three categories: Leased Equipment, Vending Equipment, and Other Businesses, each with a 'View/Update/Create' link in the Operation column. At the bottom right, there are 'Previous' and 'Next' links. The footer contains links for Copyright, Links, FAQ, Assessor, View Prior Years, and Paper Filing.

Description	Operation
Leased Equipment	View/Update/Create
Vending Equipment	View/Update/Create
Other Businesses	View/Update/Create

Fig. 20

❖ **Leased Equipment**

Click “View/Update” and/or “Create Lessor” as appropriate. This will bring you to the “Lessor” screen (Fig. 21). To return to the “Declaration of Property Belonging to Others” screen, click “Back.”

1. To edit or delete an existing lessor or lease information, click “View/Update” under the “Operation” column. This will bring you to the “Create/Update Lessor Data” screen. Add or make changes to the leased equipment information (Fig. 22). To delete a leased equipment item, check the box under “Delete” column (Fig. 23). Click “Save,” then click “Back” to return to the “Lessor” screen.
2. To create a new lessor, click “Create Lessor” (Fig. 21). This will bring you to the “Create/Update Lessor Data” screen. Fill out the leased equipment information. Click “Save,” then click “Back” to return to the “Lessor” screen.

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

Step 1 | Step 2 | Step 3 | **Step 4** | Step 5  
Ownership Info | General Info | Your Property | **Others' Property** | Certification

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2015      Company Number: [REDACTED] | View Form

### Lessor

To add a new lessor, click "Create Lessor." To edit an existing lessor or lease information click "View/Update." To delete a lessor and all associated leases, click "delete lessor."

[Create Lessor](#) [Back](#)

Lessor Name	Street	City	State, Zip	Operation
ABC CORP	888 MARKET ST	SAN FRANCISCO	CA, 94103	<a href="#">View/Update</a> <a href="#">Delete Lessor</a>
BBZZ	222 STREET	SAN FRANCISCO	CA, 94102	<a href="#">View/Update</a> <a href="#">Delete Lessor</a>

[Create Lessor](#) [Back](#)

Copyright | Links | FAQ | Assessor | View Prior Years | Paper Filing |

Fig. 21



### Create/Update Lessor Data

[Cancel](#) [Save](#) [Back](#)

Enter the data requested below regarding your lease.

Lessor Name and Mailing Address			
Lessor Name: *	ABC CORP		
Street Number:	888	Street Direction:	[v]
Street Name or P.O. Box:	MARKET	Street Type:	STREET [v]
Suite/Room:		City:	SAN FRANCISCO
State:	California [v]	Zip:	94103 [ ]
Country:	United States [v]		

Tax Obligation	Type Code ?	Year of Acq.	Year of Mfr. ?	Lease ID	Description	Cost To Purchase New ?	Annual Rent	Delete
Update Section								
Lessee [v]	Capitalized L [v]	2014	U [ ]	12345	COPIER	U [ ]	5000	[ ]
Lessor [v]	Lease-Purch [v]	2014	2013	12435	LAN	10000	1000	[ ]
Create Section								
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lessor [v]	Leased Equ [v]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

[Cancel](#) [Save](#) [Back](#)

Fig. 22



### Create/Update Lessor Data

[Cancel](#) [Save](#) [Back](#)

Enter the data requested below regarding your lease.

Lessor Name and Mailing Address			
Lessor Name: *	<input type="text"/>		
Street Number:	<input type="text"/>	Street Direction:	<input type="text" value="v"/>
Street Name or P.O. Box:	<input type="text"/>	Street Type:	<input type="text" value="v"/>
Suite/Room:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text" value="v"/>	Zip:	<input type="text"/> <input type="text"/>
Country:	<input type="text" value="v"/>		

Tax Obligation	Type Code ?	Year of Acq.	Year of Mfr. ?	Lease ID	Description	Cost To Purchase New ?	Annual Rent	Delete
Create Section								
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				
Lessor v	Leased Equ v	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>				

[Cancel](#) [Save](#) [Back](#)

Fig. 23

- ❖ **Vending Equipment** - Follow the same steps as described in the Leased Equipment section (Page 32) of this document to update this section (Fig. 24 to 26).

Carmen Chu  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
 askbpp@sfgov.org

Step 1  
Ownership Info
Step 2  
General Info
Step 3  
Your Property
Step 4  
Others' Property
Step 5  
Certification

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2015
Company Number: XXXXXXXXXX | View Form



## Vendor

To add a new vendor, click "Create Vendor." To edit an existing vendor or vending information click "View/Update." To delete a vendor, click "Delete Vendor."

[Create Vendor](#)   [Back](#)

Vendor Name	Street	City	State, Zip	Operation
AABB COMPANY	1111 HOWARD ST	SAN FRANCISCO	CA, 94111	View/Update Delete Vendor
ZZZZ	5555 FOLSOM ST	SAN FRANCISCO	CA, 94112	View/Update Delete Vendor

[Create Vendor](#)   [Back](#)

Copyright | Links | FAQ | Assessor | View Prior Years | Paper Filing

Fig. 24



## Vending Equipment

[Cancel](#) [Save](#) [Back](#)

Enter the vendor data below.

Vendor Name and Mailing Address			
Vendor Name: *	<input type="text" value="[REDACTED]"/>		
Street Number:	<input type="text" value="[REDACTED]"/>	Street Direction:	<input type="text" value=""/>
Street Name or P.O. Box:	<input type="text" value="[REDACTED]"/>	Street Type:	<input type="text" value="STREET"/>
Suite/Room:	<input type="text" value=""/>	City:	<input type="text" value="[REDACTED]"/>
State:	<input type="text" value="[REDACTED]"/>	Zip:	<input type="text" value="[REDACTED]"/>
Country:	<input type="text" value="United States"/>		

	Model and Description	Delete
Update Section		
1.	SODA VENDING MACHINE	<input type="checkbox"/>
Create Section		
2.	<input type="text" value=""/>	<input type="checkbox"/>
3.	<input type="text" value=""/>	<input type="checkbox"/>
4.	<input type="text" value=""/>	<input type="checkbox"/>
5.	<input type="text" value=""/>	<input type="checkbox"/>
6.	<input type="text" value=""/>	<input type="checkbox"/>
7.	<input type="text" value=""/>	<input type="checkbox"/>
8.	<input type="text" value=""/>	<input type="checkbox"/>
9.	<input type="text" value=""/>	<input type="checkbox"/>
10.	<input type="text" value=""/>	<input type="checkbox"/>
11.	<input type="text" value=""/>	<input type="checkbox"/>

[Cancel](#) [Save](#) [Back](#)

Fig. 25



## Vending Equipment

[Cancel](#) [Save](#) [Back](#)

Enter the vendor data below.

Vendor Name and Mailing Address			
Vendor Name: *	<input type="text"/>		
Street Number:	<input type="text"/>	Street Direction:	<input type="text" value="v"/>
Street Name or P.O. Box:	<input type="text"/>	Street Type:	<input type="text" value="v"/>
Suite/Room:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text" value="v"/>	Zip:	<input type="text"/> <input type="text"/>
Country:	<input type="text" value="United States"/>		

	Model and Description	Delete
Create Section		
1.	<input type="text"/>	<input type="checkbox"/>
2.	<input type="text"/>	<input type="checkbox"/>
3.	<input type="text"/>	<input type="checkbox"/>
4.	<input type="text"/>	<input type="checkbox"/>
5.	<input type="text"/>	<input type="checkbox"/>
6.	<input type="text"/>	<input type="checkbox"/>
7.	<input type="text"/>	<input type="checkbox"/>
8.	<input type="text"/>	<input type="checkbox"/>
9.	<input type="text"/>	<input type="checkbox"/>
10.	<input type="text"/>	<input type="checkbox"/>

[Cancel](#) [Save](#) [Back](#)

Fig. 26

- ❖ **Other Businesses** - Follow the same steps as described in the Leased Equipment section (Page 32) of this document to update this section (Fig. 27 to 29).

**Carmen Chu**  
 Assessor-Recorder  
 1155 Market Street, 5th Floor  
 San Francisco, CA 94103  
 (415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

Step 1  
*Ownership Info*
Step 2  
*General Info*
Step 3  
*Your Property*
Step 4  
*Others' Property*
Step 5  
*Certification*

[Log Off](#) | [Remarks](#) | [571-L Instructions](#) | [Help](#)

**571-L Business Property Statement - 2015** Company Number: XXXXXXXXXX | [View Form](#)



## Other Businesses

To add a new business, click "Create Business." To edit an existing business owner's information click "View/Update." To delete a business, click "Delete Business."

[Create Business](#)   [Back](#)

Owner's Name	Street	City	State, Zip	Type of Business/ Property	Operation
AAAA COMPANY		SAN FRANCISCO	CA	RETAIL	<a href="#">View/Update</a> <a href="#">Delete Business</a>
CCC COMPANY		SAN FRANCISCO	CA	WHOLESALE	<a href="#">View/Update</a> <a href="#">Delete Business</a>

[Create Business](#)   [Back](#)

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Fig. 27



### Other Businesses

[Cancel](#) [Save](#) [Back](#)

Enter the data below regarding other companies doing business at this location.

Other Business Name and Mailing Address			
Business Name: *	<input type="text"/>		
Street Number:	<input type="text"/>	Street Direction:	<input type="text" value="v"/>
Street Name or P.O. Box:	<input type="text"/>	Street Type:	<input type="text" value="STREET"/>
Suite/Room:	<input type="text"/>	City:	<input type="text" value="SAN FRANCISCO"/>
State:	<input type="text" value="California"/>	Zip:	<input type="text"/> <input type="text"/>
Country:	<input type="text" value="United States"/>		
Type of Business: *	<input type="text" value="RETAIL"/>		

[Cancel](#) [Save](#) [Back](#)

Fig. 28



### Other Businesses

[Cancel](#) [Save](#) [Back](#)

Enter the data below regarding other companies doing business at this location.

Other Business Name and Mailing Address			
Business Name: *	<input type="text"/>		
Street Number:	<input type="text"/>	Street Direction:	<input type="text" value="v"/>
Street Name or P.O. Box:	<input type="text"/>	Street Type:	<input type="text" value="v"/>
Suite/Room:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text" value="v"/>	Zip:	<input type="text"/> <input type="text"/>
Country:	<input type="text" value="v"/>		
Type of Business: *	<input type="text"/>		

[Cancel](#) [Save](#) [Back](#)

Fig. 29

## **STEP 5 – Certification (final step)**

This is the “Submit Statement” or “Certification” step of the e-File process. It is strongly recommended that you review all the existing and new information you submitted/reported before you start this step. You **CANNOT** go back to the previous steps once you submit your statement. To complete the e-File process, do the following:

1. Click “Next” on “Declaration of Property Belonging to Others” screen to start “Certification” process.
2. If the “Certification” screen shows “Certification Incomplete,” update and/or correct those sections so they are complete (Fig. 30). You cannot complete the process unless you address the necessary corrections.
3. Complete the Declaration section (Fig. 31). This section includes Ownership Type and Business Description, Federal Employer ID number, Preparer Information, and Additional Information. Save the information by clicking “Save.”
4. Click “Submit Statement.” A message window will appear with an option to “Review” or “Submit.” If you click “Review”, a new window will appear showing the unsubmitted Form 571-L Business Property Statement. You can print the form for you to review before submitting by clicking “Print.”
5. Click “Submit” to submit your business property statement. A “**Certification Complete**” screen will appear showing your **Company Name, DBA, Company Account Number, Confirmation Number, and Date of Submission** (Fig. 32).
6. Print a “Certification Complete” screen for your records.

Currently, the system does not accept any supporting documents through the e-Filing portal. If you have supporting documents, please mail them along with a copy of the “**Certification Complete**” screen page. By including a copy of the “Certification Complete” screen page allows us to accurately match your supporting documents to your original e-Filed statement. Mail the packet to the address below:

Office of the Assessor-Recorder  
Attn: Business Personal Property Division  
1155 Market Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

[Step 1 Ownership Info](#) | 
 [Step 2 General Info](#) | 
 [Step 3 Your Property](#) | 
 [Step 4 Others' Property](#) | 
 **[Step 5 Certification](#)**

[Log Off](#) | 
 [Remarks](#) | 
 [571-L Instructions](#) | 
 [Help](#)

571-L Business Property Statement - 2015 Company Number:



## Certification

[Previous](#)

Certification Incomplete

The following corrections must be made before you can submit your statement.

Page/Link	Description
<a href="#">Step 2 (f)</a>	Required information is missing on the General Info page, Step 2 (f). Please fill out all required fields as designated by an asterisk (*). Save the data, then return to this certification page.
<a href="#">Step 3 Schedule B</a>	An unaccounted difference in reported costs for Schedule B has been detected. Please review each category in Schedule B and insure that any differences in reported costs from last year are fully accounted for in Schedule D.
<a href="#">Step 4</a>	There are no items declared in "Property Belonging to Others, ". If you do not have any Leased Equipment, Vending Equipment or Other Business to report then <a href="#">click here to acknowledge</a> . Otherwise, finish Step 4 before submitting your statement.

If you have made any changes from this page, [Click Here to re-evaluate your corrections](#).

[Previous](#)

[Copyright](#) | 
 [Links](#) | 
 [FAQ](#) | 
 [Assessor](#) | 
 [Paper Filing](#)

Fig. 30



### Certification

[Previous](#)

#### Certification Incomplete

- Certification is not complete until you submit your statement via the "Submit Statement" link below. Upon certification you will receive a "Certification Complete" message along with a confirmation number.
- If you do not wish to certify at this time, you may click the "Save" link to retain any changes you have made to this form.
- To review your current form, prior to submission, you may click the "View Form" link.

**Note:** The following declaration must be completed. If you do not do so, it may result in penalties. Amendments must be filed via hard copy once you have certified.

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, 2016; and, I further declare that I am authorized to submit this statement as the assessee, or on behalf of the assessee and all co-owners and/or partners. The following declaration must be completed and submitted. If you do not do so, it may result in penalties.

Ownership Type and Business Description	
Ownership Type: *	Proprietorship
Business Description: *	Retail
Please enter your Federal Employer ID number to certify this statement	
Federal Employer ID #:	
Preparer Information	
Preparer's Name: *	Title: *
Full Address: *	
Telephone #: *	Extn #
Additional Information	
Name of Assessee or Authorized Agent: *	Title:
Name of Legal Entity (other than DBA):	

[Save](#)

[View Form](#) | [Edit Costs](#) | [Submit Statement](#)

[Previous](#)

Fig. 31



### Certification Complete

Thank you for electronically filing form 571-L. Listed below is your confirmation number.

Company Name: [REDACTED]  
DBA: [REDACTED]

Company Number: [REDACTED]

Confirmation Number: 2016210533001001

Date of Submission: February 9, 2016, 12:35:53 PM

You may view or print a copy of your e-Filed statement by clicking "View Statement" or "Print Statement" below.

[Print This Page](#) [View Statement](#) [Print Statement](#)

Fig. 32

## II (B). BUSINESS MOVED/CLOSED/SOLD

The “Questionnaire” screen includes four additional questions (indicated in the red box below) (Fig. 33). Depending on your selection, you will be redirected to another page to provide additional information. Please refer to the appropriate section below.

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

[Log Off](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016

Company Number:



### Questionnaire

Please check the boxes below that apply to you.

If you check any of the boxes on this page, and click the 'Submit' button, you will not be able to use our e-file system to file your Form 571-L. At this time, we are not able to accept electronic submissions for filers in any of the categories listed below, including filers that have no email address.

Note: We value your privacy and confidentiality. All of the information you provide us is **confidential**, including your email address. We do **not** share, sell, or in any way distribute your email address to any outside parties.

**If you have any questions you may call (415) 554-5531 or send email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org).**

- My business is a residential rental property such as an apartment house. (571-R).
- I have equipment out on lease to others.
- I am a bank or financial institution recognized by the State of California.
- I am an insurance company recognized by the State of California.
- I am a biotech company.
- I currently own or lease one or more billboards within San Francisco County.
- I do NOT have an email address. (You must have an email address to use our e-file system to file your 571-L.)

**If your business has moved, closed, or was sold, please select one of the choices below.**

- My business moved to another location **within** San Francisco County.
- My business moved to another location **outside** San Francisco County.
- My business closed.
- My business was sold.

[Submit](#) [Reset](#)

**IMPORTANT BROWSER REQUIREMENTS:**

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Download latest supported version of Internet Explorer. [Click here](#)
- Download latest version of Mozilla FireFox. [Click here](#)
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Fig. 33

II (BI). BUSINESS MOVED TO ANOTHER LOCATION WITHIN SAN FRANCISCO COUNTY

If your business moved to another location **within** San Francisco County, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 34). Click “Save” and “Submit” to go to the next screen.

Log Off   571-L Instructions   Help	
571-L Business Property Statement - 2016	Company Number: [REDACTED]01
 <h3 style="text-align: center;">Closure of Account</h3> <h4 style="text-align: center;">Additional Information Needed</h4> <p>You have indicated that your business has moved within the county. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form</p>	
Date moved : * [REDACTED] (MM/DD/YYYY)	
<b>Contact Information</b>	
Contact Name: *	[REDACTED] Title: * CFO
Phone #: *	[REDACTED] Ext. 00000
E-mail: *	[REDACTED]
Lease Termination Date: *	[REDACTED] (MM/DD/YYYY)
Name of Sub-tenant, if any:	[REDACTED]
<b>New Mailing Address</b>	
Street Number: [REDACTED]	Street Direction: [REDACTED]
Street Name/P.O.: * [REDACTED]	Street Type: BOULEVARD
Suite/Room: [REDACTED]	City: * San Francisco
State: * California	Zip: * [REDACTED]
<b>New Location Property Address</b>	
Street Number: * [REDACTED]	Street Direction: [REDACTED]
Street Name: * [REDACTED]	Street Type: [REDACTED]
Suite/Room: [REDACTED]	City: * San Francisco
State: * California	Zip: * [REDACTED]
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>	
<a href="#">Copyright</a>   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>	

Fig. 34

## Move is before the lien date

If the move date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 35). When you are finished, click “Submit.”

[Log Off](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016Company Number:



### Closure of Account Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

**Declaration**

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

**Ownership Type and Business Description**

Ownership Type: *	<input type="text"/>	Business Description: *	<input type="text" value="Service/Professional"/>
-------------------	----------------------	-------------------------	---

**Please enter your Federal Employer ID number to certify this Statement**

Federal Employer ID #:	<input type="text"/>
------------------------	----------------------

**Preparer Information**

Preparer's Name: *	<input type="text"/>	Title: *	<input type="text" value="CFO"/>
Full Address: * <span style="font-size: small;">?</span>	<input type="text"/>		
Telephone #: *	<input type="text"/>	extn #	<input type="text" value="00000"/>

**Additional Information ?**

Name of Assessee or Authorized Agent: *	<input type="text"/>	Title:	<input type="text" value="ACCOUNTANT"/>
Name of Legal Entity (other than DBA):	<input type="text"/>		

[Back](#)   [Save](#)   [Submit](#)

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#)

Fig. 35

Once, you click “Submit,” you will be directed to the “Closure of Account Certification Complete” page (Fig. 36).

Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2016 Company Number: [REDACTED]



### Closure of Account Certification Complete

Your business **MOVED WITHIN THE COUNTY** on **08/15/2015**. Updated information is listed below. Please print this page for your records.

**Please Note**

Within three weeks, you will receive 2016 Notice of Requirement to File for your new location with the information provided. If you have not received it within 3 weeks, send an email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org) or call 415-554-5531 for assistance. This existing property account ([REDACTED]) will be expired within 20 business days.

---

**Company Name:** [REDACTED]  
[REDACTED]

**Company Number:** [REDACTED]

**Contact Information**

**Contact Name:** [REDACTED]  
**Title:** [REDACTED]  
**Phone #:** [REDACTED]  
**E-mail:** [REDACTED]

**Lease Termination Date:** [REDACTED]  
**Name of Sub-tenant:** [REDACTED]

**New Mailing Address**

<b>Street Number:</b> [REDACTED]	<b>Street Direction:</b>
<b>Street Name/P.O.:</b> [REDACTED]	<b>Street Type:</b> BLVD
<b>Suite/Room.:</b>	<b>City:</b> SAN FRANCISCO
<b>State:</b> CA	<b>Zip:</b> [REDACTED]

**New Location Property Address**

<b>Street Number:</b> [REDACTED]	<b>Street Direction:</b>
<b>Street Name/P.O.:</b> [REDACTED]	<b>Street Type:</b> BLVD
<b>Suite/Room.:</b> [REDACTED]	<b>City:</b> SAN FRANCISCO
<b>State:</b> CA	<b>Zip:</b> [REDACTED]

Fig. 36

**Move is after the lien date**

If the move date you indicated is **after** the lien date, you will be directed to the “Continue e-Filing” page (Fig. 37).

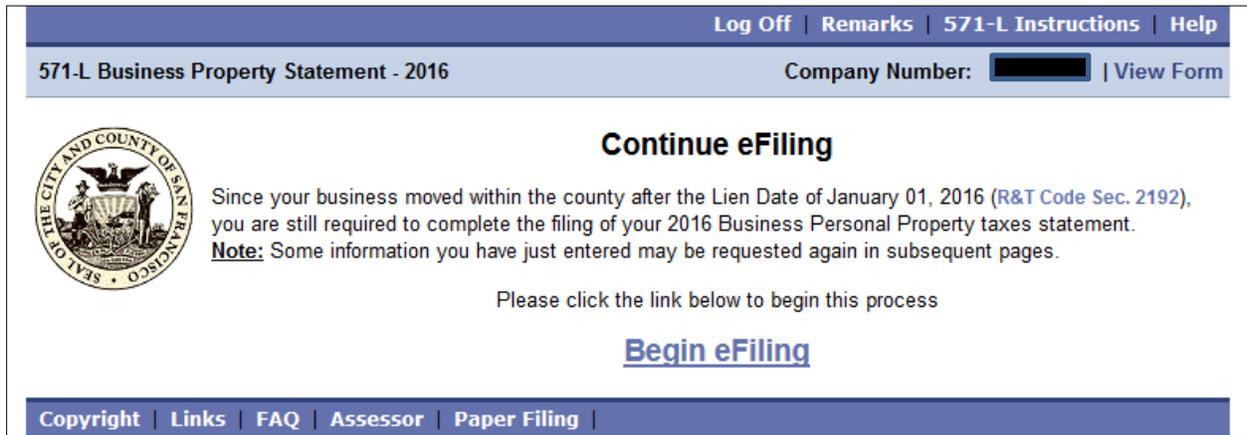


Fig. 37

Once you click “Begin e-Filing,” you will then be taken to the “Ownership” page, which is Step 1 of the e-Filing process outlined in Section II (A) of this manual.

II (BII). BUSINESS MOVED TO ANOTHER LOCATION OUTSIDE SAN FRANCISCO COUNTY

If your business moved to another location **outside** San Francisco County, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 38). Click “Save” and “Submit” to go to the next screen.

<a href="#">Log Off</a>   <a href="#">571-L Instructions</a>   <a href="#">Help</a>	
571-L Business Property Statement - 2016	
Company Number: [REDACTED]	
 <b>Closure of Account</b> <b>Additional Information Needed</b>	
You have indicated that your business has moved out of the county. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form	
Date moved : *	04/05/2015 (MM/DD/YYYY)
<b>Contact Information</b>	
Contact Name: *	[REDACTED]
Title: *	[REDACTED]
Phone #: *	( [REDACTED] ) [REDACTED] - [REDACTED] Ext. 00000
E-mail: *	[REDACTED]
Lease Termination Date: *	[REDACTED] (MM/DD/YYYY)
Name of Sub-tenant, if any:	[REDACTED]
<b>New Mailing Address</b>	
Street Number:	[REDACTED]
Street Direction:	[REDACTED]
Street Name/P.O.: *	[REDACTED]
Street Type:	[REDACTED]
Suite/Room:	[REDACTED]
City: *	[REDACTED]
State: *	[REDACTED]
Zip: *	[REDACTED]
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>	
Copyright   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>   <a href="#">View Prior Years</a>	

Fig. 38

## Move is before the lien date

If the move date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 39). When you are finished, click “Submit.”

<a href="#">Log Off</a>   <a href="#">571-L Instructions</a>   <a href="#">Help</a>	
571-L Business Property Statement - 2016	
Company Number: <input type="text"/>	
	<h3>Closure of Account Certification</h3>
	<p>Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.</p>
<b>Declaration</b>	
<p>By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.</p>	
<b>Ownership Type and Business Description</b>	
Ownership Type: *	<input type="text"/> Business Description: *
<input type="text"/>	<input type="text" value="Retail"/>
Please enter your Federal Employer ID number to certify this Statement	
Federal Employer ID #:	<input type="text"/> *
<b>Preparer Information</b>	
Preparer's Name: *	<input type="text"/>
Title: *	<input type="text"/>
Full Address: * 	<input type="text"/>
Telephone #: *	( <input type="text"/> ) <input type="text"/> - <input type="text"/> Extn # <input type="text" value="0000"/>
<b>Additional Information</b> 	
Name of Assessee or Authorized Agent: *	<input type="text"/> 
Title:	<input type="text"/>
Name of Legal Entity (other than DBA):	<input type="text"/>
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>	
Copyright   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>   <a href="#">View Prior Years</a>	

Fig. 39

Once, you click “Submit,” you will be directed to the “Closure of Account Certification Complete” page (Fig. 40).

Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2016 Company Number: [REDACTED]



### Closure of Account Certification Complete

Your business **MOVED OUT OF THE COUNTY** on **04/05/2015**. Updated information is listed below. Please print this page for your records.

**Please Note**

This existing property account ([REDACTED]) will be expired within 20 business days.

---

**Company Name:** [REDACTED]  
**DBA:** [REDACTED]  
**Company Number:** [REDACTED]

**Contact Information**

**Contact Name:** [REDACTED]  
**Title:** [REDACTED]  
**Phone #:** [REDACTED]  
**E-mail:** [REDACTED]  
**Lease Termination Date:** [REDACTED]  
**Name of Sub-tenant:** [REDACTED]

**New Mailing Address**

<b>Street Number:</b> [REDACTED]	<b>Street Direction:</b> [REDACTED]
<b>Street Name/P.O.:</b> [REDACTED]	<b>Street Type:</b> [REDACTED]
<b>Suite/Room.:</b> [REDACTED]	<b>City:</b> [REDACTED]
<b>State:</b> [REDACTED]	<b>Zip:</b> [REDACTED]

Copyright | Links | FAQ | Assessor | View Prior Years |

Fig. 40

## Move is after the lien date

If the move date you indicated is **after** the lien date, you will be directed to the “Continue eFiling” page (Fig. 41).

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2016 Company Number: [REDACTED] | View Form



### Continue eFiling

Since your business moved within the county after the Lien Date of January 01, 2016 ([R&T Code Sec. 2192](#)), you are still required to complete the filing of your 2016 Business Personal Property taxes statement.

**Note:** Some information you have just entered may be requested again in subsequent pages.

Please click the link below to begin this process

[Begin eFiling](#)

Copyright | Links | FAQ | Assessor | Paper Filing |

Fig. 41

Once you click “Begin eFiling,” you will then be taken to the “Ownership” page, which is Step 1 of the eFiling process outlined in Section II (A) of this manual.

## II (BIII). BUSINESS CLOSED

If your business closed, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 42). Click “Save” and “Submit” to go to the next screen.

<a href="#">Log Off</a>   <a href="#">571-L Instructions</a>   <a href="#">Help</a>	
571-L Business Property Statement - 2016	
Company Number: <input type="text"/>	
 <b>Closure of Business</b> <b>Additional Information Needed</b>	
You have indicated that your business has closed. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form	
Date closed : * <input type="text" value="08/14/2015"/> (MM/DD/YYYY)	
<b>Contact Information</b>	
Contact Name: *	<input type="text"/>
Title: *	<input type="text"/>
Phone #: *	( <input type="text"/> ) <input type="text"/> - <input type="text"/> Ext. <input type="text" value="00000"/>
E-mail: *	<input type="text"/>
Lease Termination Date: *	<input type="text"/> (MM/DD/YYYY)
Name of Sub-tenant, if any:	<input type="text"/>
<b>New Mailing Address</b>	
Street Number:	<input type="text"/>
Street Direction:	<input type="text"/>
Street Name/P.O.: *	<input type="text"/>
Street Type:	<input type="text"/>
Suite/Room:	<input type="text"/>
City: *	<input type="text"/>
State: *	<input type="text"/>
Zip: *	<input type="text"/>
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>	
Copyright   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>	

Fig. 42

## Closing date is before the lien date

If the closing date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 43). When you are finished, click “Submit.”

<a href="#">Log Off</a>   <a href="#">571-L Instructions</a>   <a href="#">Help</a>			
571-L Business Property Statement - 2016			
Company Number: <input type="text"/>			
	<h3>Closure of Business Certification</h3>		
	<p>Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.</p>		
<b>Declaration</b>			
<p>By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.</p>			
<b>Ownership Type and Business Description</b>			
Ownership Type: *	<input type="text"/>	Business Description: *	<input type="text"/>
Please enter your Federal Employer ID number to certify this Statement			
Federal Employer ID #:	<input type="text"/>		
<b>Preparer Information</b>			
Preparer's Name: *	<input type="text"/>	Title: *	<input type="text"/>
Full Address: *	<input type="text"/>		
Telephone #: *	( <input type="text"/> ) <input type="text"/> - <input type="text"/>	Extn #	<input type="text"/>
<b>Additional Information</b> ?			
Name of Assessee or Authorized Agent: *	<input type="text"/>	Title:	<input type="text"/>
Name of Legal Entity (other than DBA):	<input type="text"/>		
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>			
Copyright   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>			

Fig. 43

After submission, you will be directed to the “Closure of Business Certification Complete” page (Fig. 44).

[Log Off](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016Company Number: [REDACTED]



## Closure of Business Certification Complete

Your business was **CLOSED** on **08/14/2015**. Updated information is listed below. Please print this page for your records.

**Please Note**

This existing property account ([REDACTED]) will be expired within 20 business days.

**Company Name:** [REDACTED]  
**DBA:** [REDACTED]  
**Company Number:** [REDACTED]

**Contact Information**

---

**Contact Name:** [REDACTED]  
**Title:** [REDACTED]  
**Phone #:** [REDACTED]  
**E-mail:** [REDACTED]  
**Lease Termination Date:** [REDACTED]  
**Name of Sub-tenant:** [REDACTED]

**New Mailing Address**

---

<b>Street Number:</b> [REDACTED]	<b>Street Direction:</b> [REDACTED]
<b>Street Name/P.O.:</b> [REDACTED]	<b>Street Type:</b> [REDACTED]
<b>Suite/Room.:</b> [REDACTED]	<b>City:</b> [REDACTED]
<b>State:</b> [REDACTED]	<b>Zip:</b> [REDACTED]

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#)

Fig. 44

**Closing date is after the lien date**

If the closing date you indicated is **after** the lien date, you will be directed to the “Continue eFiling” page (Fig. 45).

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2016 Company Number: [REDACTED] | View Form

**Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2016 (R&T Code Sec. 2192), you are still required to complete the filing of your 2016 Business Personal Property taxes statement.

**Note:** Some information you have just entered may be requested again in subsequent pages.

Please click the link below to begin this process

[Begin eFiling](#)

Copyright | Links | FAQ | Assessor | Paper Filing |

Fig. 45

Once you click “Begin eFiling,” you will then be taken to the “Ownership” page, which is Step 1 of the eFiling process outlined in Section II (A) of this manual.

## II (BIV). BUSINESS SOLD

If your business moved closed, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 46). Click “Save” and “Submit” to go to the next screen.

<a href="#">Log Off</a>   <a href="#">571-L Instructions</a>   <a href="#">Help</a>	
571-L Business Property Statement - 2016	
Company Number: <input type="text"/>	
 <b>Sale of Business</b> <b>Additional Information Needed</b>	
You have indicated that your business was sold. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form	
Date sold : * <input type="text" value="12/31/2015"/> (MM/DD/YYYY)	
<b>New Owner's Contact Information</b>	
Owner/Entity: *	<input type="text"/>
Contact Name: *	<input type="text"/>
Title: *	<input type="text"/>
Phone #: *	( <input type="text"/> ) <input type="text"/> - <input type="text"/> Ext. 00000
E-mail: *	<input type="text"/>
<b>Seller's New Mailing Address</b>	
Street Number:	<input type="text"/>
Street Direction:	<input type="text"/>
Street Name/P.O.: *	<input type="text"/>
Street Type:	<input type="text"/>
Suite/Room:	<input type="text"/>
City: *	<input type="text"/>
State: *	<input type="text"/>
Zip: *	<input type="text"/>
<a href="#">Back</a> <a href="#">Save</a> <a href="#">Submit</a>	
Copyright   <a href="#">Links</a>   <a href="#">FAQ</a>   <a href="#">Assessor</a>	

Fig. 46

## Sale date is before the lien date

If the sale date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (\*) before you can go to the next step (Fig. 47). When you are finished, click “Submit.”

[Log Off](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016Company Number:



### Sale of Business Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

**Declaration**

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

**Ownership Type and Business Description**

Ownership Type: *	<input type="text" value="Proprietorship"/>	Business Description: *	<input type="text" value="Retail"/>
-------------------	---	-------------------------	-------------------------------------

**Please enter your Federal Employer ID number to certify this Statement**

Federal Employer ID #:

**Preparer Information**

Preparer's Name: *	<input type="text"/>	Title: *	<input type="text"/>
Full Address: * 	<input type="text"/>		
Telephone #: *	<input 2"="" type="text" value="( ) - - Extn # 00000&lt;/td&gt;&lt;td colspan="/>		

**Additional Information **

Name of Assessee or Authorized Agent: *	<input type="text"/>	Title:	<input type="text"/>
Name of Legal Entity (other than DBA):	<input type="text"/>		

[Back](#)   [Save](#)   [Submit](#)

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#)

Fig. 47

**Sale date is after the lien date**

If the sale date you indicated is **after** the lien date, you will be directed to the “Continue eFiling” page (Fig. 48).

Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2016 Company Number: [REDACTED] | View Form



**Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2016 (R&T Code Sec. 2192), you are still required to complete the filing of your 2016 Business Personal Property taxes statement.

**Note:** Some information you have just entered may be requested again in subsequent pages.

Please click the link below to begin this process

[Begin eFiling](#)

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Fig. 48

Once you click “Begin eFiling,” you will then be taken to the “Ownership” page, which is Step 1 of the eFiling process outlined in Section II (A) of this manual.



# **Filing a Form 571-L Paper Document**

**III**

### III. FILING A FORM 571-L PAPER DOCUMENT

#### III (A). FILE BY MAIL USER'S GUIDE (DOWNLOAD, PRINT, COMPLETE, SIGN & MAIL)

This guide will provide businesses using our “File by Mail” program with step-by-step instructions on how to download and print hard copies of the Form 571-L Business Property Statement or Form 571-R Apartment House Property Statement, whichever applicable.

In February 2016, you received one of the following four Notices: (1) *Notice of Requirement to File 2016 Form 571-L Business Property Statement*, (2) *Notice to e-File 2016 Form 571-L Business Property Statement*, (3) *Direct Bill Notice*, or (4) *Low Value Exemption Notice*. Use the Account Number and PIN printed on the Notice to access your business account online.

For more information, please refer to the Frequently Asked Questions (FAQs) section of this document on Section V.

The minimum system requirements are as follows:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, Mobile Devices are **NOT** supported at this time.

## INSTRUCTIONS:

1. Go to the San Francisco County Assessor's e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on "[FILE 2016 STATEMENT](#)" (Fig. 49).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

[Home](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016



### Welcome to the County Assessor's e-File System!

Your business has been pre-selected for online filing of your 2016 Form 571-L Business Property Statement. There are two ways in which you can file your statement:

- 1) E-File Directly Online, or
- 2) Download, Print, Complete, Sign and Mail.

Click "FILE 2016 STATEMENT" to begin.

» [FILE 2016 STATEMENT](#)

**IMPORTANT DATES TO REMEMBER :**

- April 1 - Due Date for Form 571-L Business Property Statement.
- May 7 - Last Day to File  
**May 7, 2016 falls on a Saturday. Therefore, any property statement that is postmarked on the next business day (Monday, May 9) will be considered timely. Any statements postmarked after May 9 will have a 10% penalty assessed in accordance with Section 441(b) of the California Revenue and Taxation Code.**
- May 31 - Last Day to Use E-Filing System. Thereafter, this site will become unavailable for filing statements and you must file hardcopy. However, all statements filed electronically may still be viewed after this date.

[VIEW STATEMENT](#)

**IMPORTANT BROWSER REQUIREMENTS:**

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Note: Apple Safari, Google Chrome, or Mobile Devices are NOT supported at this time.
- Download latest supported version of Internet Explorer. [Click here](#)
- Download latest version of Mozilla FireFox. [Click here](#)
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#) |

Fig. 49

2. Follow the same steps as described in the II (A) II on page 10-11 to logon and/or retrieve your PIN as appropriate (Fig 50 & 51).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

[Home](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016



### Logon

Please enter the nine-digit business Account # as it appears on the: 1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, or (2) Notice to e-File 2016 Form 571-L Business Property Statement, or (3) Direct Bill Notice, or (4) Low Value Exemption Notice. Then, enter the PIN#. Please note that the PIN # is case sensitive. For assistance click on "Help".

For Electronic Filing businesses, prior to submitting your filing, you may review and/or print a copy of your Form 571-L Business Property Statement. After filing, a confirmation number, date, and time will be provided for your records.

For Electronic Filing businesses, you do not have to complete your filing at one time. You may save your data at any time by clicking "Save". After logging in, if you feel additional information is necessary, please click and enter using the "Remarks" link at the top of any page.

Account #:  (Do not enter dashes or spaces.)  
 PIN:  (PINs case sensitive.)

[Submit](#)   [Reset](#)   [Forgot My Pin](#)

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Fig. 50

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
askbpp@sfgov.org

[Home](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016



### Forgot My PIN

To retrieve your PIN, please enter your nine-digit account number without dashes, the five-digit mailing address zip code, and the two-digit month and four-digit year for when your business opened.

Account Number:	<input type="text"/> (No spaces or dashes)
Mailing Address Zip Code:	<input type="text"/>
Date your business opened:	mm: <input type="text"/> yyyy: <input type="text"/>

[Return To Login](#)   [Clear Form](#)   [Retrieve My PIN](#)

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Fig. 51

3. Click on the “File by Mail (Download, Print, Complete, Sign and Mail)” button (Fig. 52).

Carmen Chu  
Assessor-Recorder  
1155 Market Street, 5th Floor  
San Francisco, CA 94103  
(415) 554-5531  
[askbpp@sfgov.org](mailto:askbpp@sfgov.org)

Log Off | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2016 Company Number:



## Welcome

Please choose how you want to file.

**Electronic Filing** (E-File Directly Online)

**Accessible:** You can access your current and previous years filed statements anytime and anywhere there is an internet connection.

**Accurate:** Less mistakes in processing the return, because data is loaded electronically.

**Convenient:** The ability to 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 your 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 Form 571-L statement, and it is not a public document.

**File by Mail** (Download, Print, Complete, Sign and Mail)

Businesses that choose not to file electronically this year, MUST download, print, complete, sign and mail the Form 571-L statement. Our office will NOT be mailing you a hard copy statement

If you have any questions you may call (415) 554-5531 or send email to [askbpp@sfgov.org](mailto:askbpp@sfgov.org).

Copyright | [Links](#) | [FAQ](#) | [Assessor](#) | [Paper Filing](#) |

Fig. 52

4. A prompt window will appear, then click on “[Form 571-L \[PDF\]](#)” (Fig. 53) or “[Form 571-R \[PDF\]](#)” (Fig. 54), whichever applicable, to download the Form.

*Additionally, some of the screens included are for 2015s, but no changes have been made to those screens for the 2016 tax year.*

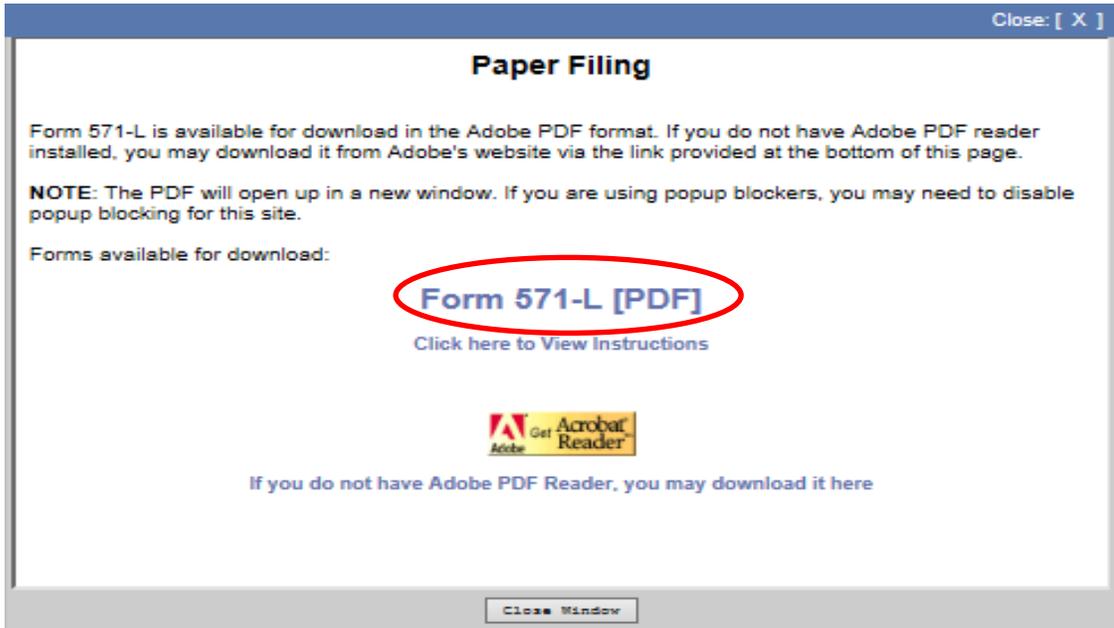


Fig. 53

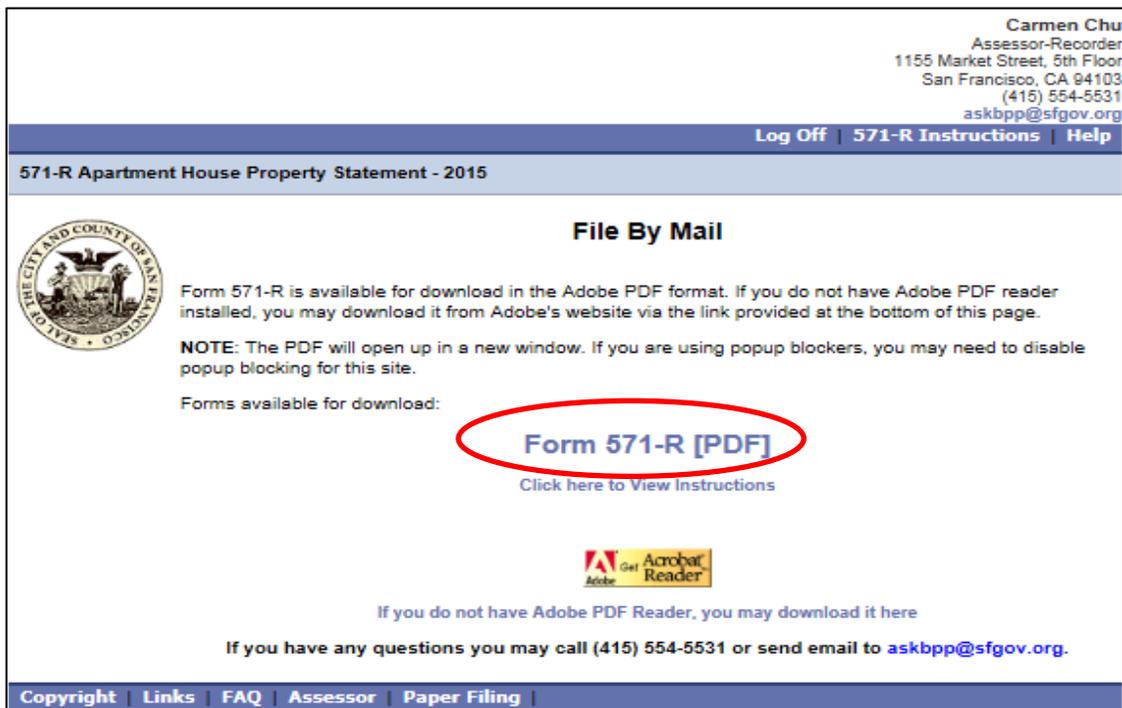


Fig. 54

5. After clicking on “Form 571-L [PDF]” (Fig. 55) or “Form 571-R [PDF]” (Fig. 56), the browser will open a new tab containing the Form 571-L or Form 571-R and schedules. Please check all the information to ensure accuracy.

**FORM 571-L** **2015**

CARMEN CHU, ASSESSOR-RECORDER  
 BUSINESS PROPERTY STATEMENT  
 CITY & COUNTY OF SAN FRANCISCO  
 1155 Market St., 5<sup>th</sup> Floor, San Francisco, CA 94103 • asklepp@sfgov.org • www.sfassessor.org

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION  
 AS OF 12:01 A.M., JANUARY 1, 2015

RETURN THIS ORIGINAL FORM.  
 COPIES WILL NOT BE ACCEPTED.  
 FILE RETURN BY APRIL 1, 2015

ACCOUNT NUMBER	LA BY	LOCATION OF RECORDS	ROLL CODE	0000	VOL BLK LOT
			U		

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

LOCATION OF 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, 2014 through December 31, 2014

(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.

<b>PART II: DECLARATION OF PROPERTY BELONGING TO YOU</b> (attach schedule for any adjustment to cost)	<b>COST</b> (omit cents) (see instructions)	<b>ASSESSOR'S USE ONLY</b>
1. Supplies		
2. Equipment	(From line 35)	
3. Equipment out on lease, rent, or conditional sale to others	(Attach Schedule)	

Fig. 55

**FORM 571-R** **2015**

CARMEN CHU, ASSESSOR-RECORDER  
 APARTMENT HOUSE PROPERTY STATEMENT  
 CITY & COUNTY OF SAN FRANCISCO  
 1155 Market St., 5<sup>th</sup> Floor, San Francisco, CA 94103 • asklepp@sfgov.org • www.sfassessor.org

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION  
 AS OF 12:01 A.M., JANUARY 1, 2015

RETURN THIS ORIGINAL FORM.  
 COPIES WILL NOT BE ACCEPTED.  
 FILE RETURN BY APRIL 1, 2015

ACCOUNT NUMBER	LA BY	027	APN

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

LOCATION OF THE PROPERTY (street, city)  
 (File a separate statement for each location)

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 mailing address of the new owner:  
 Name \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City and State \_\_\_\_\_ Zip Code \_\_\_\_\_

2. Enter the total number of units for the location listed.  
 \_\_\_\_\_ Do you live in one of the units?  
 Yes  No

3. If yes, enter the unit number \_\_\_\_\_  
 During the period of January 1, 2014 through December 31, 2014:

(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.	<b>ASSESSOR'S USE ONLY</b>
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.	
NAME AND ADDRESS OF OWNER OF SUCH PROPERTY	QUANTITY AND DESCRIPTION

Fig. 56

6. Print the Form and schedules.
7. You are required to submit a document with an Assessor's Office generated bar code on it. Therefore, a barcode has to appear on the front page (see images Fig. 55 & Fig. 56). If there is no barcode or only numbers show up, the barcode is incorrectly printed. Please review if your browser is the latest version. If not, please download the latest version and try again.

If you still have difficulty to get the barcode printed, please follow the following steps:

### Using a PDF reader plugin:

To change from using the built-in PDF viewer to your PDF reader plugin:

- a) Click the menu button  and choose Options.
- b) Select the Applications panel.
- c) Find **Portable Document Format (PDF)** on the list and click on it to select it.
- d) Click on the drop-down arrow in the **Action** column for the above entry and select **Use PDF reader name (in Firefox)** (Fig. 57).

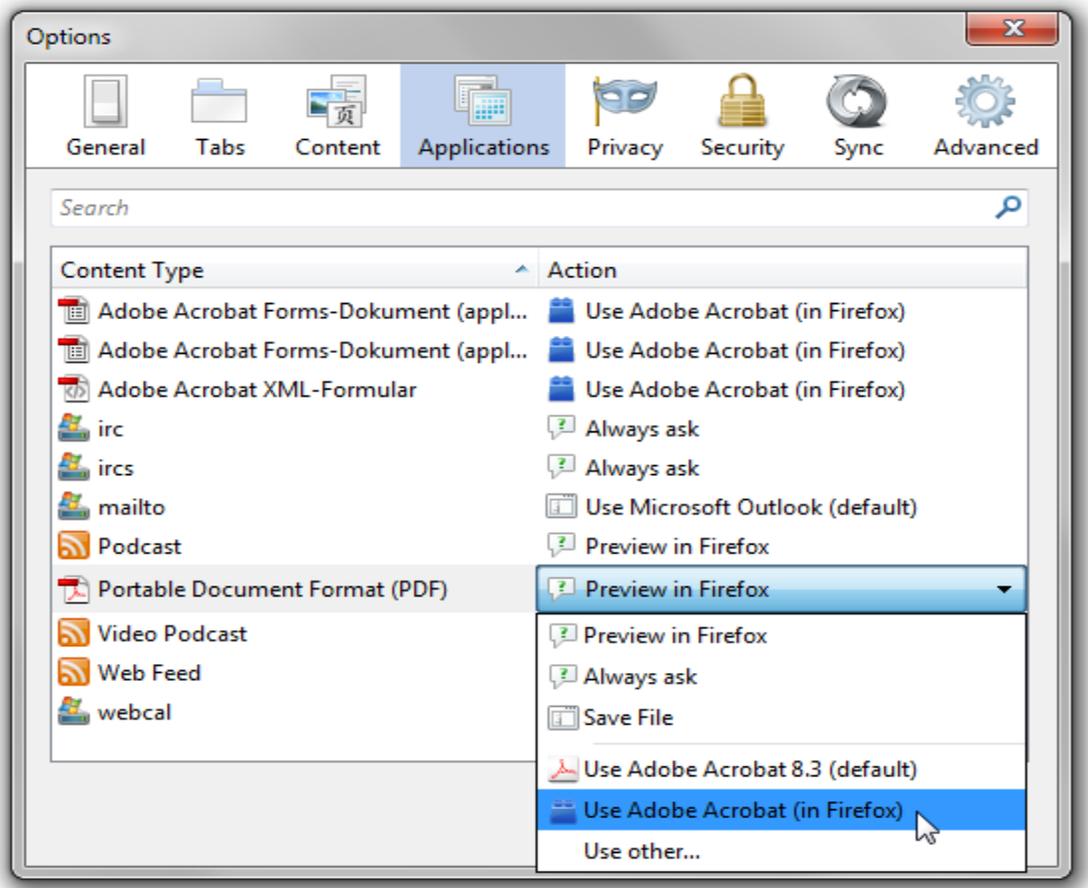


Fig. 57

8. Complete the Form 571-L or Form 571-R by filling-in all the necessary information and data.

9. After completing, reviewing and signing the Form, please mail it to:

Office of the Assessor-Recorder  
Attn: Business Personal Property Division  
1155 Market Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

### **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 addresses changes, 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 1<sup>st</sup> 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 31<sup>st</sup> 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 the 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 does 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.**



# **Filing through the SDR Website**

**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](http://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

<b>E-FILING</b>	<b>SDR</b>
<p><b>File One Statement at a Time</b> Complete one statement at a time online (recommended for businesses with 1 to 20 locations in up to 10 counties)</p>	<p><b>File Many Statements at One Time</b> One to 4000 statements (XML files) can be filed in 1 to 58 counties all at once.</p>
<p><b>View Statement Data Before Filing</b> Use the PRINT function within e-File to review and print your statement before submitting the statement for certification.</p>	<p><b>View Statement Data Before Filing</b> Use the SDR style sheet.</p>
<p><b>Print Statement After Filing</b> Print the Certification page with the confirmation number and date/time stamp. Use the PRINT function within e-File to print the submitted statement.</p>	<p><b>Print Statements After Filing</b> No statement print capability available.</p>
<p><b>Confirmation and Date</b> Each certified statement is assigned a confirmation number and date/time stamp.</p>	<p><b>Confirmation and Date</b> Each statement is assigned an SDR confirmation number and date/time stamp.</p>
<p><b>Account Number</b> 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.</p>	<p><b>Account Number</b> 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.</p>
<p><b>PIN</b> 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.</p>	<p><b>PIN</b> Not required to file.</p>
<p><b>Address</b> Mail to address is required. Situs/property address is required.</p>	<p><b>Address</b> Mail to address is required. Situs/property address is required.</p>
<p><b>Statement Type</b> 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-P or LEQ; these forms must be submitted on hard copy.</p>	<p><b>Statement Type</b> 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.</p>
<p><b>Registration</b> Not required. Use the Account Number and PIN.</p>	<p><b>Registration</b> Required.</p>
<p><b>Amendment/Changes</b> Amendments must be submitted on hardcopy. Notes to Assessor are recommended.</p>	<p><b>Amendment/Changes</b> 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.</p>
<p><b>Prior Year Statements</b> Prior year e-File statements are accessible for viewing and printing.</p>	<p><b>Prior Year Statements</b> None</p>



# **Business Personal Property Frequently Asked Questions (FAQs)**

V

## V. GENERAL BUSINESS PERSONAL PROPERTY FREQUENTLY ASKED QUESTIONS (FAQS)

### 1. **When is Business Personal Property appraised?**

Unlike real property, business personal property is appraised annually. Owners of all businesses must file a business property statement each year with the Assessor's Office detailing the cost of all their supplies, equipment, and fixtures at each location. This is required unless the Assessor's Office has already established the value of the business property and sent out a notification of "direct billing" or "low value exemption." Business inventory is exempt from taxation. For more information, call (415) 554-5531.

### 2. **I have a business in San Francisco but did not receive a Business Property Statement, what shall I do?**

You are not going to receive a hard copy of the 2016 Form 571-L Business Property Statement. Instead, you will receive one of the following documents: (1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, (2) Notice to e-File 2016 Form 571-L Business Property Statement, (3) Direct Bill Notice, and (4) Low Value Exemption Notice. The Notice that you received is in lieu of a hard copy of the statement. Account Number and PIN are printed on the Notice. Please use them to either 1) e-File Directly Online, or 2) Download, Print, Complete, Sign and Mail your Form 571-L. Each statement downloaded from our website is assigned with a barcode that is specific to each business which is necessary for receiving, processing, and valuation purposes.

If you did not receive the above document(s), please call our office at (415) 554-5531 or email [askbpp@gov.org](mailto:askbpp@gov.org).

### 3. **Why are you taxing my business assets, under what authority?**

The State Constitution says that all property is subject to property tax unless otherwise exempt. Most people are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation. Section 201 of the Revenue and Taxation Code of California states that "All property in this State, not exempt under the laws of the United States or of this State, is subject to taxation under this code."

#### **4. 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. 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 or application software.

#### **5. Who must file a Business Property Statement?**

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

a) The Assessor's Office has sent you one of the two documents: (1) Notice of Requirement to File 2016 Form 571-L Business Property Statement; and (2) Notice to e-File 2016 Form 571-L Business Property Statement;

OR

b) You have taxable business property with a total cost of \$100,000 or more, located within the City and County as of January 1<sup>st</sup> of each year, even if the Assessor's Office did not send, or 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 files), you will receive a notice to file Form 571-L 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 file 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 and impose the tax on your business, in arrears for 4 years, plus penalties and interests.

#### **6. 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.

**7. When is the lien date?**

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

**8. What is the due date for the Business Property Statement?**

The due date for filing the Business Property Statement is April 1<sup>st</sup>.

**9. Is my Form 571-L Business Property Statement and/or Form 571-R Apartment House Property Statement confidential?**

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

**10. What is the last date to file the Business Property Statement without a penalty?**

The last day to file the Form 571-L Business Property Statement without a penalty is May 7th (postmarked). *If May 7 falls on a Saturday, Sunday, or legal holiday, a property statement that is mailed and postmarked on the next business day shall be deemed to have been filed on May 7.* Pursuant to California Revenue and Taxation Code Sections 441 (b) & 463, if a business fails to file the Form 571-L Business Property Statement or it is filed late, a 10% penalty will be added to the assessment.

**11. I was not open for business on January 1<sup>st</sup>. Do I still have to complete the statement?**

Yes. A business does not have to be opened for its taxable personal property to be subject to assessment. For example, let's presume that on the lien date, January 1<sup>st</sup>, 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.

**12. I received a Notice from your office, but I went out of business prior to January 1<sup>st</sup>. Do I still have to complete the statement?**

Yes, you need to notify our office the closure of your business by mailing in the completed statement. Please go to the San Francisco County Assessor's e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on "File 2016 Statement". Enter Account Number and PIN on Logon page to login. (1) Click "Electronic Filing" on Welcome page and click "Continue with Current Browser" on Questionnaire page. Choose "My Business

Closed” option in the middle of the page and submit. Follow the instructions until the end; or (2) Click “By Mail Filing” on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has closed and the closing date. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance.

**13. I went out of business after the lien date. Do I still have to complete the statement and pay personal property taxes?**

Yes. The law specifies that all taxable personal property must be assessed as of a specific point in time, and that point is precisely at 12:01 a.m. January 1<sup>st</sup> (regardless of what transpires after that date). Even if closed shortly after the lien date (January 1<sup>st</sup>), a business must still file a Form 571-L Business Property Statement. Please refer to FAQ 10.

**14. My business has moved to a new location within San Francisco.**

Yes, you need to notify our office the movement of your business. Please go to the San Francisco County Assessor’s e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on “File 2016 Statement”. Enter Account Number and PIN on Logon page and submit. (1) Click “Electronic Filing” on Welcome page and click “Continue with Current Browser” on Questionnaire page. Choose “My Business Moved to Another Location within San Francisco County” option in the middle of the page and submit. Follow the instructions until the end; or (2) Click “By Mail Filing” on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has moved within San Francisco and the moving date. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance. Upon received of your information, we will close the old account and create a new account number and PIN for new location for you to e-File.

**15. My business has moved to a new location outside of San Francisco.**

Yes, you need to e-File to notify our office the movement of your business. Please go to the San Francisco County Assessor’s e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on “File 2016 Statement”. Enter Account Number and PIN on Logon page then submit. (1) Click “Electronic Filing” on Welcome page and click “Continue with Current Browser” on Questionnaire page. Choose “My Business Moved to Another Location Outside San Francisco County” option in the middle of the page and submit. Follow the instructions until the end. Upon received the information from you, we will close your account; or (2) Click “By Mail Filing” on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has moved within San

Francisco and the moving date. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance.

If you moved out to another county before January 1<sup>st</sup>, make a notation on the statement that you have moved outside of the county. Mail the statement to the address indicated on the form and contact the new county to request a Business Property Statement.

**16. I closed or sold my business. Do I still have to file the statement?**

Yes, you need to notify our office the movement of your business. Please go to the San Francisco County Assessor's e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on "File 2016 Statement". Enter Account Number and PIN on Logon page and submit. (1) Click "Electronic Filing" on Welcome page and click "Continue with Current Browser" on Questionnaire page. Choose "My Business closed/was sold" option(s) in the middle of the page and submit. Follow the instructions until the end; or (2) Click "By Mail Filing" on Welcome page and follow the instruction (Section III (A)). Please indicate on the statement the status (closed or sold) of your business including the date the status change took place. Please indicate the disposition of the equipment, if closed, or the name of the buyer, if sold, then sign the front page and mail it to the Assessor's Office.

**17. Are non-profit organizations required to file Business Property Statements?**

Yes, the filing laws apply to non-profit organizations. However, nonprofit organizations may qualify for property tax exemptions. For more information, please contact the Exemptions Division of the Assessor's Office. If the ownership name begins with A through I, call (415) 554-5658; J through R, call (415) 554-5584; and S through Z, call (415) 554-5250.

**18. All the equipment I use in my business was given to me and I don't know what to report on my property statement?**

Equipment gifted to you for use in your business is taxable and must be reported on the property statement. If you don't know the equipment cost and/or year of acquisition, provide a good description including make and model and the general condition of each piece of equipment.

**19. Can I get a copy of my prior year Form 571-L statement?**

If you filed your Form 571-L Business Property Statement using e-File last year, you can print copies of your prior year's statement by selecting "View Statement" from the e-File home page and logon with your Account Number and PIN.

To receive a hard copy of your prior year's statement, please go to [www.sfassessor.org](http://www.sfassessor.org), click on "Forms & Notices" in blue bar, and then click on "View All" under "Forms." In the upper right hand corner at "Search this site" box, type in "Request for Copy," the second item to appear is "Request for Copies of Business Property Documents." Click on that title, click on "Download Form," and follow the instructions. Email this completed form as an attachment to [askbpp@sfgov.org](mailto:askbpp@sfgov.org) or fax to (415) 554-5544 or mail to the Business Personal Property Division, 1155 Market Street, 5<sup>th</sup> Floor, San Francisco, CA 94103. If you are an agent of a taxpayer, an authorization letter from the business owner is required.

**20. How is the assessed value determined?**

Assessment begins with the cost of the asset, including sales tax, freight and installation. The Assessor applies a depreciation factor to the asset cost and this becomes the assessed value. The depreciation schedule is based on the expected economic life of the asset, and is different from the depreciation schedule used by tax accountants.

**21. If the statement (571-L/571-R) is not filed, how is my assessed value determined?**

The Assessor's Office, directed by state law, will arbitrarily determine an assessable value. In addition, a 10% penalty for failure to file will be added to your assessment (R&T Code, Sections 441, 463 and 501).

**22. I do not own anything and lease all my equipment; do I still have to file the statement?**

Yes. You are required to report this information in Part III of the statement so that the Assessor can properly locate and assess the actual owner of the equipment. However, if you own any small equipment, such as printer, copier, supplies, etc., which you are using in the business you need to report these costs under Part II of the statement.

**23. Who can sign the statement?**

The law requires that the Form 571-L Business Property Statement and Form 571-R Apartment House 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/571-R 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/571-R must be signed by an LLC manager. If the Form 571-L/571-R 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.

**24. I have already completed and sent my Business Property Statement and now realize that I have to amend the statement. What should I do?**

You will have to resubmit or file a new statement with all the preprinted identification that was on the initial statement. Please indicate this is an "AMENDED COPY" to the statement that was submitted previously. You may call the Business Division at (415) 554-5531 and ask for another statement, if necessary. Statements that were initially filed on time may be amended without penalty until May 31<sup>st</sup> (R&T Code, Sec. 441 (i)).

**25. How much will my taxes be?**

Applying the 2016 tax rate of 1.1826% will give a conservative estimate of what the actual tax liability will be. Proposition 13 established a tax rate of 1% of the value of assessable property. San Francisco tax rate is determined by the Board of Supervisors, based on property assessed value and bond measures passed by San Francisco voters. For example, if the business depreciated assessed value is \$125,000 the property taxes on the business assets will be approximately \$1,478.

**26. When will I receive my bill?**

If you file your Form 571-L Business Property Statement and/or Form 571-R Apartment House Property Statement in a timely manner, you should receive your tax bill by the end of June. Payment is due on or before August 31st and becomes delinquent after that date. Delinquent bills will be subject to penalties and interest imposed by the San Francisco Office of the Treasurer & Tax Collector.

If the owner of the business also owns the building in which the business resides, the business property tax will be included with the Secured Property Tax Bill. The secured property tax bill is sent out in October with the first installment due by November 1st.

**27. I received my Unsecured Tax bill but don't understand the valuation under Structures/Fixtures?**

This line item includes assessments for a combined structural improvements, as well as any fixtures to your property that was reported during this lien year.

**28. 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 1<sup>st</sup>. An estimated cost can be used if physical inventory is not available.

**29. How do I report disposals?**

If you disposed business personal property before 12:01 a.m., January 1<sup>st</sup>, exclude the original cost of the disposed property from its year of acquisition. For example, in 2015, you reported a \$2,000 computer you acquired in 2005 then sold prior to January 1<sup>st</sup>, 2016. In this year's filing (2016), you should exclude the \$2,000 cost from the cost reported for the 2005 year of acquisition. Do not report negative costs in 2015 or deduct it from 2015 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' by clicking on the amount under the 'Unreported Change' column under the 'Schedule B Cost Detail.' 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.

**30. What if I don't agree with the value on my tax bill, can I dispute it?**

Yes, you can dispute the tax bill if you don't agree with the value.

The value can be corrected by our office if a clerical or administrative error was made. If this is the case, first contact the Business Personal Property Division of the Assessor's office at (415) 554-5531 to speak to a staff member about correcting the error. Our normal business hours are Monday through Friday, 8:00 a.m. to 5:00 p.m. PST.

If the disagreement is a matter of valuation and penalty, you must file an "Application for Changed Assessment" with the San Francisco Assessment Appeals Board (AAB) no later than September 15<sup>th</sup> for the regular tax bill. The AAB's telephone number is (415) 554-6778. Even if you file an appeal, you must still pay the bill by August 31<sup>st</sup> to avoid late payment penalties; a refund will be issued if the Assessment Appeals Board rules in your favor.

**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 and Taxation Code 129)
- Application Software (Property Tax Rule 152)
- Licensed Motor Vehicles (R&T Code 10751)
- First \$50,000 of employee-owned Hand Tools (R&T Code 241)

**32. Is the Business Property statement subject to audit?**

Yes, the Business Property Statement is subject to audit by the Assessor's Office. A new law was enacted and became effective January 1<sup>st</sup>, 2009. This law basically gives the Assessor the discretion to audit a significant number of all businesses to encourage the accurate and proper reporting of personal property.

**33. Have questions? Here are some additional resources to assist businesses in completing the Form 571-L.**

- In-person Workshops: to be held at the Business Personal Property Division, 1155 Market Street, 5th Floor, San Francisco, CA 94103
  - Wednesday, March 2nd, 2016 from 10:00-11:00 a.m.
  - Thursday, March 24th, 2016 from 4:00-5:00 p.m.
- Call our Office at (415) 554-5531 or email [askbpp@sfgov.org](mailto:askbpp@sfgov.org).

## V (A). E-FILE FREQUENTLY ASKED QUESTIONS (FAQS)

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

Only certain business owners are eligible to use our e-filing portal to file their Form 571-L Business Property Statements. You may participate in e-Filing your statement this year if you received in the mail one of the following documents in the mail: a Notice of Requirement to File 2016 Form 571-L Business Property Statement, a Notice To e-File 2016 Form 571-L Business Property Statement, a Direct Bill Notice, or 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 use the e-Filing portal to submit your 571-L 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 2016 Notice to e-file this year.

### 3. 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.

**4. Businesses not eligible to e-File:**

- Residential Rental Property (Form 571-R)
- Leasing Companies
- Financial Institutions recognized by the State of California
- Insurance Companies recognized by the State of California
- Billboard Companies
- Biotech Companies
- Any business that does not have an email address

**5. I logged in with my Account Number and PIN and selected Electronic Filing, but I received an error message. What should I do?**

The most common cause for unexpected error messages is due to an unsupported Browser version. Please confirm that you meet the minimum browser requirements:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, Mobile Devices are **NOT** supported at this time.

If you are still receiving an error and are using one of these supported Browsers, please select “File by Mail” to download, print, complete, sign, and mail the hard copy Form 571-L Business Property Statement.

**6. 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.**

The PIN is case sensitive, so make sure that you are entering a capital “SF” when typing the PIN. Select ‘Submit’ to go to the next page.

**7. I forgot my PIN, how do I retrieve it?**

To retrieve your PIN, please go to the San Francisco County Assessor's e-Filing website, [www.sfassessor.org/efile](http://www.sfassessor.org/efile), and click on “FILE 2016 STATEMENT”. Click “Forgot My Pin” at the bottom of Logon page. Enter your nine-digit account number without dashes, the five digit mailing address zip code, and the two-digit month and four-digit year for when your business opened.

8. **The e-File screens and printed copy of the Business Property Statement are too large – they are truncated on the right side that I can't see the complete statement.**

Update your Microsoft Explorer view configuration by selecting 'View' on the top toolbar, then 'Text Size', and select a smaller text size. Alternatively, you may select a different "Zoom" level. To do this, select "View" from your Browser's toolbar, choose "Zoom," and select a smaller zoom level. This can also be done using your Mouse and keyboard, by holding down the CTRL key on your keyboard and using your mouse's scroll-wheel at the same time.

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?**

No, you cannot attach documents to e-File. However, after you have successfully submitted your e-Filed statement, you can mail your attachment with the copy of the "**Certification Complete**" page to our office.

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

A "Certification Complete" page will appear after you click "Submit." This page includes your company name, company number, confirmation number, and date and time of your submission. Please print and keep a copy for your records. If you do not see the confirmation number after submitting, it means that your e-File statement has not been submitted successfully and you should go back and resubmit it.

**12. Can I amend my Form 571-L Business Property Statement using e-File? How do I amend e-Filed statement and when is the deadline?**

No, you cannot amend a Form 571-L Business Property Statement using e-File once you have already completed ‘Step 5: Certification.’

You will need to print a copy of the submitted Form 571-L to make your changes and mail it to the address below:

Office of the Assessor-Recorder  
Attn: Business Personal Property Division  
1155 Market Street, 5<sup>th</sup> Floor  
San Francisco, CA 94103

Please indicate that it is an AMENDED COPY to the statement that was submitted through e-File. Pursuant to California Revenue and Taxation Code Section 441(i), statements may be amended without penalty until May 31<sup>st</sup>.

**13. I completed my Form 571-L Business Property Statement, but I forgot to print a copy. Can I still print a copy of my Form 571-L statement?**

Yes, you can print a copy of your certified Form 571-L statement at any time. At the “Logon” screen, enter your Account Number and PIN. Select “View Statement” from the e-File home page.

**14. What is the last date to electronically file the Form 571-L 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 7<sup>th</sup>). 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).

**15. How can I get a copy of my prior year’s Form 571-L Business Property Statement?**

If you filed your Form 571-L Business Property Statement using e-File last year, you can print copies of your prior year’s statement by selecting “View Statement” from the e-File home page and logon with your Account Number and PIN.



# 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.

Email: [askbpp@sfgov.org](mailto:askbpp@sfgov.org)

Fax: (415) 554-5544

Telephone: (415) 554-5531

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



# 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)

New Business Registration Form

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**

**2016**

1155 Market St., Room 500, San Francisco, CA 94103 • askbpps@sfgov.org • www.sfassessor.org

RETURN THIS ORIGINAL FORM  
COPIES WILL NOT BE ACCEPTED.  
FILE RETURN BY APRIL 1, 2016

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION  
AS OF 12:01 A.M., JANUARY 1, 2016

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 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, 2015 through December 31, 2015

(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.

**PART II: DECLARATION OF PROPERTY BELONGING TO YOU**

*(Attach schedule for any adjustment to cost)*

	COST (omit cents) <i>(See instructions)</i>	ASSESSOR'S USE ONLY
1. Supplies		
2. Equipment <i>(From IR-155)</i>		
3. Equipment out on lease, rent, or conditional sale to others <i>(Attach Schedule)</i>		
4. Bldgs., Bldg. Impr., and/or Leasehold Impr., Land Impr., Land <i>(From line 1)</i>		
5. Construction In Progress <i>(Attach Schedule)</i>		
6. Alternate Schedule A <i>(See instructions)</i>		
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

PROPERTY TYPE BY CODE NUMBER	Year of Acq.	Year of Mt.	Description and Lease or Identification Number	Cost to Purchase Now	Annual Rent
1. Leased equipment					
2. Lease-purchase option equipment					
3. Capitalized leased equipment					
4. Vending equipment					
5. Other businesses					
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, 2016.

SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT\* \_\_\_\_\_ DATE \_\_\_\_\_

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

**BUSINESS DESCRIPTION (✓)**

Retail  NAME OF LEGAL ENTITY (other than DBA) *(typed or printed)* \_\_\_\_\_ FEDERAL EMPLOYER ID NUMBER \_\_\_\_\_

Wholesale

Manufacturer  PREPARER'S NAME AND ADDRESS *(typed or printed)* \_\_\_\_\_ TELEPHONE NUMBER ( ) \_\_\_\_\_ TITLE \_\_\_\_\_

Service/Professional

\*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.

L I N E N O	Calendar Year of Acq.	1. MACHINERY AND EQUIPMENT FOR INDUSTRY, PROFESSION, OR TRADE <i>(do not include licensed vehicles)</i>				2. OFFICE FURNITURE AND EQUIPMENT		3. OTHER EQUIPMENT <i>(describe)</i>			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	2015										2015				
12	2014										2014				
13	2013										2013				
14	2012										2012				
15	2011										2011				
16	2010										2010				
17	2009										2009				
18	2008										Prior				
19	2007										Total				
20	2006										5a. PERSONAL COMPUTERS				
21	2005											COST	ASSESSOR'S USE ONLY		
22	2004										2015				
23	2003										2015				
24	2002										2014				
25	2001										2013				
26	2000										2012				
27	1999										2011				
28	1998										2010				
29	1997										2009				
30	1996										2008				
31	1995										2007				
32	1994										Prior				
33	Prior										Total				
34	Total										5b. LOCAL AREA NETWORK (LAN) EQUIPMENT AND MAINFRAMES				
35	Add TOTALS on lines 19, 33, 34, 46 and any additional schedules. ENTER HERE AND ON PART II, LINE 2											COST	ASSESSOR'S USE ONLY		
36	ASSESSOR'S USE ONLY											2015			
37	CLASSIFICATION	COL	FULL VALUE BASE	FULL VALUE	PERS. PROP. RCLND	PERS. PROP. ADJUSTMENT	PERS. PROP. FULL VALUE						2014		
38	Machinery & equipment	1											2013		
39	Office furniture & equipment	2											2012		
40	Tools, molds, dies & jigs	4											2011		
41	Personal Computers	5a											2010		
42	LAN and Mainframe	5b											2009		
43													2008		
44	Other equipment	3											2007		
45	Schedule B — Fixtures	-											Prior		
46	TOTALS												Total		

SAMPLE

**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.

L I N E N O	Calendar Year of Acq.	BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS				3. LAND IMPROVEMENTS <i>(e.g., blacktop, curbs, fences)</i>		4. LAND AND LAND DEVELOPMENT <i>(e.g., fill, grading)</i>	
		1. STRUCTURE ITEMS ONLY <i>(see instructions)</i>		2. FIXTURES ONLY <i>(see instructions)</i>		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY
		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY				
47	2015								
48	2014								
49	2013								
50	2012								
51	2011								
52	2010								
53	2009								
54	2008								
55	2007								
56	2006								
57	2005								
58	2004								
59	2003								
60	2002								
61	2001								
62	2000								
63	1999								
64	1998								
65	1997								
66	1996								
67	1995								
68	1994								
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 <b>yes</b> indicate amount \$ _____								

SAMPLE

REMARKS:

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**OFFICIAL REQUEST**

DO NOT RETURN THESE INSTRUCTIONS

California law prescribes a yearly ad valorem tax based on property as it exists at 12:01 a.m. on January 1 (tax lien date). This form constitutes an official request that you declare all assessable business property situated in this county which you owned, claimed, possessed, controlled, or managed on the tax lien date, and that you sign (under penalty of perjury) and return the statement to the Assessor's Office by the date cited on the face of the form as required by law. Failure to file the statement during the time provided in section 441 of the Revenue and Taxation Code will compel the Assessor to estimate the value of your property from other information in the Assessor's possession and add a penalty of 10 percent of the assessed value as required by section 463 of the Code.

If you own taxable personal property in any other county whose aggregate cost is \$100,000 or more for any assessment year, you must file a property statement with the Assessor of that county whether or not you are requested to do so. Any person not otherwise required to file a statement shall do so upon request of the Assessor regardless of aggregate cost of property. The Assessor of the county will supply you with a form upon request.

Except for the "DECLARATION BY ASSESSEE" section, you may furnish attachments in lieu of entering the information on this property statement. However, such attachments must contain all the information requested by the statement and these instructions. The attachments must be in a format acceptable to the Assessor, and the property statement must contain appropriate references to the attachments and must be properly signed. In all instances, you must return the original BOE-571-L.

THIS STATEMENT IS SUBJECT TO AUDIT.	THIS STATEMENT IS NOT A PUBLIC DOCUMENT. THE INFORMATION DECLARED WILL BE HELD SECRET BY THE ASSESSOR.	IF ANY SITUATION EXISTS WHICH NECESSITATES A DEVIATION FROM TOTAL COST PER BOOKS AND RECORDS, FULLY EXPLAIN ALL ADJUSTMENTS.
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**INSTRUCTIONS***(complete the statement as follows)*

**NAME.** If the information has been preprinted by the Assessor, make necessary corrections. **INDIVIDUALS**, enter the last name first, then the first name and middle initial. **PARTNERSHIPS** must enter at least two names, showing last name, first name and middle initial for each partner. **CORPORATIONS** report the full corporate name. If the business operates under a **DBA** (Doing Business As) or **FICTITIOUS NAME**, enter the DBA (Fictitious) name under which you are operating in this county below the name of the sole owner, partnership, or corporation.

**LOCATION OF THE PROPERTY.** Enter the complete street address. Forms for additional business or warehouse locations will be furnished upon request. A listing may be attached to a single property statement for your vending equipment leased or rented to others, when any such properties are situated at many locations within this county.

**USE TAX INFORMATION**

California use tax is imposed on consumers of tangible personal property that is used, consumed, given away or stored in this state. Businesses must report and pay use tax on items purchased from out-of-state vendors not required to collect California tax on their sales. If your business is not required to have a seller's permit with the State Board of Equalization, the use tax may be reported and paid on your California State Income Tax Return or directly to the State Board of Equalization using our pay use tax on one-time purchase option available online. Obtain additional use tax information by calling the State Board of Equalization Information Center at 1-800-400-7115 or from the website - <http://www.boe.ca.gov/sutax/usetax.htm#page=Business>.

**Part I: GENERAL INFORMATION***[complete items (a) through (g)]*

**OWNERSHIP OF LAND — (c).** Check either the YES or the NO box to indicate whether you own the land at the LOCATION OF THE PROPERTY shown on this statement. If YES is checked, verify the official RECORDED NAME on your DEED. If it agrees with the name shown on this statement, check the second YES box. If it does not agree, check the second NO box.

**LOCATION OF RECORDS — (e and f).** Enter the address or addresses at which your general ledger and all related accounting records are maintained and available for audit. If you enter your tax agent or representative's address, indicate whether all or only part of the records are at that address, and the location of the remainder, if applicable.

**PROPERTY TRANSFER — (g).**

**Real Property** – For purposes of reporting a change in control, real property includes land, structures, or fixtures owned or held under lease from (1) a private owner if the remaining term of the lease exceeds 35 years, including written renewal options, (2) a public owner (any arm or agency of local, state, or federal government) for any term or (3) mineral rights owned or held on lease for any term, whether in production or not.

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.

#### SCHEDULE A — COST DETAIL: EQUIPMENT

Do not include property already reported in Part III.

**LINES 11-46.** Enter in the appropriate column the cost of your equipment segregated by calendar year of acquisition, include short-lived or expensed equipment. Total each column. Report full cost; do not deduct investment credits, trade-in allowances or depreciation. Include equipment acquired through a lease-purchase agreement at the selling price effective at the inception of the lease and report the year of the lease as the year of acquisition (if final payment has **not** been made, report such equipment in PART III). Report self-constructed equipment used by you at the proper trade level in accordance with Title 18, section 10, of the California Code of Regulations. Exclude the cost of normal maintenance and repair that does not extend the life nor modify the use of the equipment. Exclude the cost of equipment actually removed from the site. The cost of equipment retired but not removed from the site must be reported. Segregate and report on PART II, line 3, the cost of equipment out on lease or rent.

Include special mobile equipment (SE Plates). Exclude motor vehicles licensed for operation on the highways. However, you must report overweight and oversized rubber-tired vehicles, except licensed commercial vehicles and cranes, which require permits issued by the Department of Transportation to operate on the highways. If you have paid a license fee prior to January 1 on these large vehicles, contact the Assessor for an *Application for Deduction of Vehicle License Fees from Property Tax* and file it with the Tax Collector. Report overweight and oversized vehicles in Column 3.

Computers used in any application directly related to manufacturing, or used to control or monitor machinery or equipment, should be reported in Column 1. Do not include application software costs in accordance with section 995.2 of the California Revenue and Taxation Code. Personal Computers should be reported on Schedule A, column 5a; Local Area Network (LAN) equipment, including LAN Components, and Mainframes should be reported on Schedule A, column 5b. Personal computers include the following: Desktops, Docking Stations, Ink Jet Printers, Laptops, Laser Printers, Mini Towers, Monitors, Netbooks, Notebooks, PC Power Supply, Scanners, Workstations. Local Area Network Equipment includes the following: External Storage Devices, Hubs, Mainframes, Network Attached Storage Devices, Routers, Servers, Switches. LAN Components include, but are not limited to, the following: Network Disk & Tape Drives, Network Fan Trays, Network Memory, Network Portable Storage Devices, Network Power Supply, Network Adaptors, Network Interface Cards, Network Processors.

If necessary, asset titles in Schedule A may be changed to better fit your property holdings; however, the titles should be of such clarity that the property is adequately defined.

**LINES 18, 32, 33 and 45.** For "prior" years acquisition, you must attach a separate schedule detailing the cost of such equipment by year(s) of acquisition. Enter the total cost of all such acquisitions on lines 18, 32, 33 and 45.

**LINE 35.** Add totals on lines 19, Column 4; line 33, Column 5a; line 34, Columns 1, 2, 3; line 46, Column 5b; and any additional schedules. Enter the same figure on PART II, line 2, that you entered in the box.

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

**LINES 47-71.** Report by calendar year of acquisition the original or allocated costs (per your books and records) of buildings and building or leasehold improvements; land improvements; land and land development owned by you at this location on January 1. Include finance charges for buildings or improvements which have been constructed for an enterprise's own use. If no finance charges were incurred because funding was supplied by the owner, then indicate so in the remarks. In the appropriate column enter costs, including cost of fully depreciated items, by the calendar year of acquisition and total each column. Do not include items that are reported in Schedule A.

If you had any additions or disposals reported in Columns 1, 2, 3, or 4 during the period of January 1, 2015 through December 31, 2015, attach a schedule showing the month and year and description of each addition and disposal. Enclosed for this purpose is BOE-571-D, *Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B of the Business Property Statement*. If additional forms are needed, photocopy the enclosed BOE-571-D.

**Controlling Interest** – When any person or legal entity obtains more than 50 percent of the voting stock of a corporation, or more than a 50 percent ownership interest in any other type of legal entity. The interest obtained includes what is acquired directly or indirectly by a parent or affiliated entity.

**Forms, Filing Requirements & Penalty Information** – Contact the Legal Entity Ownership Program Section at 916-274-3410 or refer to the Board's website at [www.boe.ca.gov](http://www.boe.ca.gov) to obtain form BOE-100-B, applicable filing requirements, and penalty information.

## Part II: DECLARATION OF PROPERTY BELONGING TO YOU

Report book cost (100 percent of actual cost). Include excise, sales, and use taxes, freight-in, installation charges, and all other relevant costs. Report any additional information which will assist the Assessor in arriving at a fair market value. Include finance charges for buildings and improvements that are constructed or otherwise produced for an enterprise's own use (including assets constructed or produced by others) for which deposits or progress payments have been made. **Do not** include finance charges for purchased equipment.

**LINE 1. SUPPLIES.** Report supplies on hand, such as stationery and office supplies, chemicals used to produce a chemical or physical reaction, janitorial and lavatory supplies, fuel, sandpaper, etc., at their current replacement costs. Include medical, legal, or accounting supplies held by a person in connection with a profession that is primarily a service activity. **Do not** include supplies which will become a component part of the product you manufacture or sell.

**LINE 2. EQUIPMENT.** Enter total from Schedule A, line 35 (see instructions for Schedule A).

**LINE 3. EQUIPMENT OUT ON LEASE, RENT, OR CONDITIONAL SALE TO OTHERS.** Report cost on line 3 and attach schedules showing the following: equipment actually out on lease or rent, equipment out on a conditional sale agreement, and equipment held for lease or rent which you have used or intend to use must be reported. Equipment held for lease or rent and not otherwise used by you is exempt and should not be reported.

**Equipment out on lease, rent, or conditional sale.** (1) Name and address of party in possession, (2) location of the property, (3) quantity and description, (4) date of acquisition, (5) your cost, selling price, and annual rent, (6) lease or identification number, (7) date and duration of lease, (8) how acquired (purchased, manufactured, or other — explain), (9) whether a lease or a conditional sale agreement. If the property is used by a free public library or a free museum or is **used exclusively** by a public school, community college, state college, state university, church, or a nonprofit college it may be exempt from property taxes, provided the lessor's exemption claim is filed by February 15. Obtain BOE-263, *Lessors' Exemption Claim*, from the Assessor. **Also include equipment on your premises held for lease or rent which you have used or intend to use.** Report your cost and your selling price by year of acquisition.

**LINE 4. BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS, LAND IMPROVEMENTS, LAND AND LAND DEVELOPMENT.** Enter total from Schedule B, line 71 (see instructions for Schedule B).

**LINE 5. CONSTRUCTION IN PROGRESS.** If you have unallocated costs of construction in progress for improvements to land, machinery, equipment, furniture, buildings or other improvements, or leasehold improvements, attach an itemized listing. Include all tangible property, even though not entered on your books and records. Enter the total on PART II, line 5.

**LINE 6. ALTERNATE OR IN-LIEU SCHEDULE.** If the Assessor enclosed BOE-571-L, *Alternate Schedule A*, with this property statement, complete the alternate schedule as directed and report the total cost on line 6.

**LINES 7-8. OTHER.** Describe and report the cost of tangible property not reported elsewhere on this form.

## 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.

Segregate the buildings and building or leasehold improvements into the two requested categories (items which have dual function will be classified according to their primary function). Examples of some property items and their most common categorization are listed below:

**EXAMPLES OF STRUCTURE ITEMS, Column 1**

An improvement will be classified as a structure when its primary use or purpose is for housing or accommodation of personnel, personalty, or fixtures and has no direct application to the process or function of a trade, industry, or profession.

Air conditioning (except process cooling)  
Boilers (except manufacturing process)  
Central heating & cooling plants  
Craneways  
Elevators  
Environmental control devices (if an integral part of the structure)  
Fans & ducts (part of an air circulation system for the building)  
Fire alarm systems  
Partitions (floor to ceiling)  
Pipelines, pipe supports & pumps used to operate the facilities of a building  
Pits not used in the trade or process  
Railroad spurs  
Refrigeration systems (integral part of the building)  
Refrigerators, walk-in (excluding operating equipment) which are an integral part of the building  
Restaurants — rough plumbing to fixtures  
Safes — imbedded  
Signs which are an integral part of the building excluding sign cabinet (face & lettering)  
Silos or tanks when primarily used for storage or distribution  
Sprinkler systems  
Store fronts  
Television & radio antenna towers

**EXAMPLES OF FIXTURE ITEMS, Column 2**

An improvement will be classified as a fixture if its use or purpose directly applies to or augments the process or function of a trade, industry, or profession.

Air conditioning (process cooling)  
Boilers (manufacturing process)  
Burglar alarm systems  
Conveyors (to move materials and products)  
Cranes — traveling  
Environmental control devices (used in production process)  
Fans & ducts (used for processing)  
Floors, raised computer rooms  
Furnaces, process  
Ice dispensers, coin operated  
Machinery fdns. & pits (not part of normal flooring fdns.)  
Permanent partitions (less than floor to ceiling)  
Pipelines, pipe supports, pumps used in the production process  
Pits used as clarifiers, skimmers, sumps & for greasing in the trade or manufacturing process  
Plumbing — special purpose  
Power wiring, switch gear & power panels used in mfg. process.  
Refrigeration systems (not an integral part of the building)  
Refrigerators, walk-in unitized; including operating equipment  
Restaurant equipment used in food & drink preparation or service (plumbing fixtures, sinks, bars, soda fountains, booths & counters, garbage disposals, dishwashers, hoods, etc.)  
Scales including platform & pit  
Signs — all sign cabinets (face) & free standing signs including supports  
Silos or tanks when primarily used for processing

**LINE 69.** If you have items reportable in Schedule B which were acquired in 1992 or previously, you **must** attach a separate schedule detailing the cost of such items by year(s) of acquisition. Enter the total cost of such items on line 69.

**LINE 71.** Add totals on line 70 and any additional schedules. Enter the same figure on PART II, line 4 that you entered in the box.

**LINE 72.** Report tenant improvements for which you received allowances during this reporting period that are not reported on Schedule B.

**DECLARATION BY ASSESSEE**

The law requires that this property statement, regardless of where it is executed, shall be declared to be true under penalty of perjury under the laws of the State of California. The declaration must be signed by the assessee, a duly appointed fiduciary, or a person authorized to sign on behalf of the assessee. In the case of a **corporation**, the declaration 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 the declaration on behalf of the corporation. In the case of a **partnership**, the declaration must be signed by a partner or an authorized employee or agent. In the case of a **Limited Liability Company (LLC)**, the declaration must be signed by an LLC manager, or by a member where there is no manager, or by an employee or agent designated by the LLC manager or by the members to sign on behalf of the LLC.

When signed by an employee or agent, other than a member of the bar, a certified public accountant, a public accountant, an enrolled agent or a duly appointed fiduciary, the assessee's written authorization of the employee or agent to sign the declaration on behalf of the assessee must be filed with the Assessor. The Assessor may at any time require a person who signs a property statement and who is required to have written authorization to provide proof of authorization.

A property statement that is not signed and executed in accordance with the foregoing instructions is not validly filed. The penalty imposed by section 483 of the Revenue and Taxation Code for failure to file is applicable to unsigned property statements.





# FORM 571-L ALTERNATE SCHEDULE A

## For Bank, Insurance Company, or Financial Corporation Fixtures

BOE-571-LA (P1) REV. 19 (05-15)

### 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	2015									
74	2014									
75	2013									
76	2012									
77	2011									
78	2010									
79	2009									
80	2008									
81	2007									
82	2006									
83	2005									
84	2004									
85	2003									
86	2002									
87	2001									
88	2000									
89	1999									
90	1998									
91	1997									
92	1996									
93	1995									
94	1994									
95	Prior									
96	Total									

SAMPLE

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 Acquis.	Enter Code (V) or (N)	5. VAULT DOORS (V) AND NIGHT DEPOSITORIES (N)		Enter Year of Acquis.	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
									Counterlines, etc.		
									Camera, etc.		
									Carpets, drapes		
									ATMs		
									Vault doors, etc.		
									Kiosks, etc.		
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 fixture. 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 Depository, "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 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.)

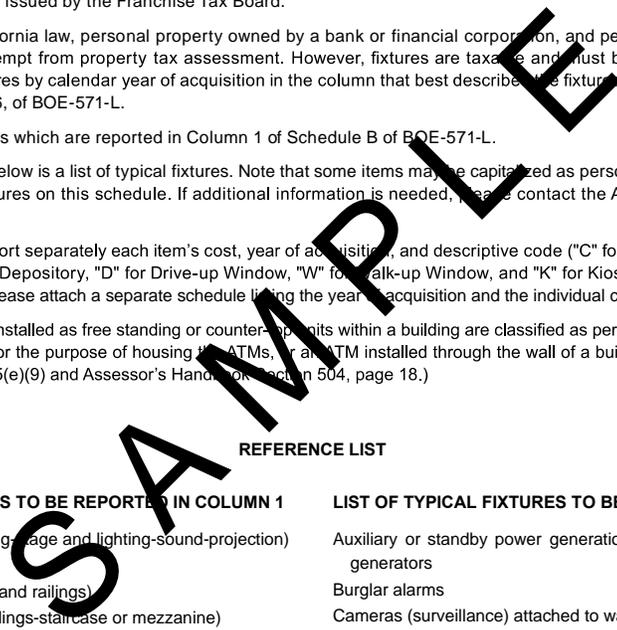
**REFERENCE LIST**

**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**

**2016**

1155 Market St., Room 500, San Francisco, CA 94103 • askbtp@sfgov.org • www.sfassessor.org

RETURN THIS ORIGINAL FORM.  
 COPIES WILL NOT BE ACCEPTED.  
 FILE RETURN BY APRIL 1, 2016

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION  
 AS OF 12:01 A.M., JANUARY 1, 2016

ACCOUNT NUMBER	LA BY	APN
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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:

LOCATION OF THE PROPERTY (street, city)  
 (file a separate statement for each location)

2. Enter the total number of units for the location listed.  
 Do you live in one of the units?  
 Yes  No
- If yes, enter unit number \_\_\_\_\_
3. During the period of January 1, 2015 through December 31, 2015:
- (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.

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 mailing address of the previous owner:

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City and State \_\_\_\_\_ Zip Code \_\_\_\_\_

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.							ASSESSOR'S USE ONLY
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.							ASSESSOR'S USE ONLY
	SLP ROOM	STUDIO	1 BEDRM	2 BEDRM	3 BEDRM	LARGER	
FULLY FURNISHED							
PARTLY FURNISHED							
UNFURNISHED							
TOTALS							
7. Supplies				Cost \$			ASSESSOR'S USE ONLY
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



## INSTRUCTIONS

The Revenue and Taxation Code of the State of California requires that every person, upon request of the Assessor, shall file a written property statement under penalty of perjury with the Assessor within such time as the Assessor may appoint. Please complete this form according to the numbered instructions provided below as your statement of furnishings and related equipment owned, possessed or controlled by you as of 12:01 a.m., January 1, this year at the location listed. Property which you are purchasing under a conditional sales contract must be included. **Return the completed statement form to the Assessor on or before the date stated in the official requirement section.** In all instances, you must return the original BOE-571-R.

### LINE 3. PROPERTY TRANSFER

**Real Property** – For purposes of reporting a change in control, real property includes land, structures, or fixtures owned or held under lease from (1) a private owner if the remaining term of the lease exceeds 35 years, including written renewal options, (2) a public owner (any arm or agency of local, state, or federal government) for any term or (3) mineral rights owned or held on lease for any term, whether in production or not.

**Controlling Interest** – When any person or legal entity obtains more than 50 percent of the voting stock of a corporation, or more than a 50 percent ownership interest in any other type of legal entity. The interest obtained includes what is acquired directly or indirectly by a parent or affiliated entity.

**Forms, Filing Requirements & Penalty Information** – Contact the Legal Entity Ownership Program Section at 916-274-3410 or refer to the Board's website at [www.boe.ca.gov](http://www.boe.ca.gov) to obtain form BOE-100-B, applicable filing requirements, and penalty information.

**LINE 4.** Check the appropriate box. If **yes** is checked, enter the name and address of the owner of the furniture or equipment. Briefly describe the nature of the business or property. **Do not** report household furnishings owned by tenants and used in their living quarters, or other personal property owned or controlled by tenants.

**LINE 5.** Check the appropriate box. If **yes** is checked, enter the name and address of the owner or lessor and the quantity and description of the furniture or equipment. The lessor of the items will be asked to declare them.

**LINE 6.** Enter the number of fully furnished, partly furnished, and unfurnished units in the appropriate column or columns. If the owner of the building (other than a corporation) occupies a unit as his living quarters, do not include it. Please indicate in the **REMARKS** area the items contained in a typical **PARTLY FURNISHED** apartment of each size. A *sleeping room* is a room with no kitchen facilities; a *studio* contains a kitchen and a convertible living room; a *1 bedrm.* contains a bedroom, living room, kitchen, etc. Attach additional sheets if necessary.

**LINE 7.** Enter the cost of supplies that are on hand at 12:01 a.m. on January 1 of this year. Include janitorial and pool supplies, whether carried in your asset accounts or expensed.

**LINES 8 and 9.** Enter the total cost from Schedules A and B.

**SCHEDULE A.** Complete the schedule as instructed. If a portion of the furniture used in your rental units has been placed in storage, include the cost in the schedule and enter in the remarks the address where stored. **Do not** include built-in appliances, installed carpeting, or drapes as furniture; such items are considered part of the building. **Include** ranges, refrigerators, dishwashers, etc., if not built-in.

**SCHEDULE B.** Complete the schedule as instructed. **Include** all equipment not reported in Schedule A. If you care to attach a schedule listing types of equipment separately, you may do so.

### DECLARATION BY ASSESSEE

The law requires that this property statement, regardless of where it is executed, shall be declared to be true under penalty of perjury under the laws of the State of California. The declaration must be signed by the assessee, a duly appointed fiduciary, or a person authorized to sign on behalf of the assessee. In the case of a **corporation**, the declaration 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 the declaration on behalf of the corporation. In the case of a **partnership**, the declaration must be signed by a partner or an authorized employee or agent. In the case of a **Limited Liability Company (LLC)**, the declaration must be signed by an LLC manager, or by a member where there is no manager, or by an employee or agent designated by the LLC manager or by the members to sign on behalf of the LLC.

When signed by an employee or agent, other than a member of the bar, a certified public accountant, a public accountant, an enrolled agent or a duly appointed fiduciary, the assessee's written authorization of the employee or agent to sign the declaration on behalf of the assessee must be filed with the Assessor. The Assessor may at any time require a person who signs a property statement and who is required to have written authorization to provide proof of authorization.

A property statement that is not signed and executed in accordance with the foregoing instructions is not validly filed. The penalty imposed by section 463 of the Revenue and Taxation Code for failure to file is applicable to unsigned property statements.

**THIS STATEMENT IS NOT A PUBLIC DOCUMENT. THE INFORMATION DECLARED  
WILL BE HELD SECRET BY THE ASSESSOR.**

# NEW BUSINESS REGISTRATION FORM

CARMEN CHU  
ASSESSOR-RECORDER



SAN FRANCISCO  
OFFICE OF THE ASSESSOR-RECORDER

## New Business Registration Form

**Instructions:** New businesses must register with the Office of the Assessor-Recorder, Business Personal Property Division. Complete this form and submit it via mail, fax, or e-mail using the contact information provided at the bottom of this Form.

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

Type of Ownership: Sole Proprietorship Partnership Corporation Other: \_\_\_\_\_

Business Name (DBA): \_\_\_\_\_

Type of Business: Retail Wholesale Manufacturer Service/Professional

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

Business Location: \_\_\_\_\_ Effective Date of Current Location: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Did you move from another location within the City and County of San Francisco? Yes No

If yes, indicate previous address: \_\_\_\_\_ Effective Date: \_\_\_\_\_

Number of additional active business locations within the City and County of San Francisco: \_\_\_\_\_

Please list your additional active business locations:

1. Business Location: \_\_\_\_\_ Effective Date: \_\_\_\_\_

2. Business Location: \_\_\_\_\_ Effective Date: \_\_\_\_\_

3. Business Location: \_\_\_\_\_ Effective Date: \_\_\_\_\_

Remarks: \_\_\_\_\_

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

Date Signed

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

# REQUEST FOR ADDRESS AND OTHER CHANGES FORM

CARMEN CHU  
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 by 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: \_\_\_\_\_

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Signature

Printed Name

Date Signed

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San Francisco, CA 94103  
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**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.*

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