



CITY AND COUNTY OF SAN FRANCISCO  
OFFICE OF THE ASSESSOR-RECORDER

**TRANSFER TAX AFFIDAVIT**

FOR RECORDER'S USE ONLY  
Document Number: \_\_\_\_\_

**NOTICE: ANY MATERIAL MISREPRESENTATION OF FACT IN THIS AFFIDAVIT IS A MISDEMEANOR UNDER SAN FRANCISCO BUSINESS AND TAX REGULATIONS CODE SECTION 1116. ANY PERSON WHO MAKES SUCH A MISREPRESENTATION IS SUBJECT TO PROSECUTION FOR SUCH OFFENSE.**

*The information provided in this affidavit shall be maintained confidential to the extent provided in Section 1118 of the San Francisco Business and Tax Regulations Code.*

1. PROPERTY LOCATION - ASSESSOR'S PARCEL NUMBER (APN): Block: \_\_\_\_\_ Lot: \_\_\_\_\_  
Street Address: \_\_\_\_\_

2. PANGALAN NG (MGA) TAONG NILIPATAN: \_\_\_\_\_  
PANGALAN NG GRANTOR: \_\_\_\_\_

3. IS THIS A FORECLOSURE/DEED IN LIEU OF FORECLOSURE OR A TRUSTEE SALE?

- Oo (Kumpletuhin ang seksiyong ito)     Hindi (Pumunta sa #4)  
Ang taong nilipatan ba ang nag-iilit na taga-mana o nagbigay ng sangla?     Oo (Kumpletuhin 3a)  
 Hindi (Kumpletuhin 3b)

a. Kung oo i-calculate kasama ng mga gastos:

Dagdag ang di-binayang utang ng taong nilipatan (kung mababa sa \$0, isulat ang \$0)	\$ _____
<i>dagdag</i> Binayang utang sa lupa na inangkin ng taong nilipatan katumbas ang <i>equals</i> Taxable Basis (ipasok ang halaga sa Line 10a)	\$ _____
	\$ _____

b. Kung hindi, i-calculate:

Pangkalahatang halagang binayad sa trustee sale	\$ _____
<i>dagdag</i> Ang di-binayang utang naiwan sa lupa na inako ng grantee, katumbas ang <i>equals</i> Taxable Basis (ipasok ang halaga sa Line 10a)	\$ _____
	\$ _____

4. IS THIS A LEASE?     Yes (Complete this section)                       No (Proceed to #5)

a. Is the remaining term of the lease including renewal options equal to or greater than 35 years?  
 Yes (Complete i and ii)                       No (No transfer tax is due)

i. If yes, submit copy of the lease or summary of the financial terms

ii. Consideration or Value of leasehold interest: \$ \_\_\_\_\_; enter amount on line 10a

5. IS THIS A QUALIFYING RENT-RESTRICTED AFFORDABLE HOUSING TRANSFER UNDER SECTION 1108.6 OF THE SAN FRANCISCO BUSINESS AND TAX REGULATIONS CODE?  Yes                       No (Proceed to #6)  
If yes, a certificate from the Mayor's Office of Housing and Community Development confirming the transfer qualifies under Section 1108.6 of the San Francisco Business and Tax Regulations Code **must** be submitted

6. IS THIS AN UNRECORDED TRANSFER UNDER SECTION 1111(d) OF THE SAN FRANCISCO BUSINESS AND TAX REGULATIONS CODE?  Yes (Complete this section)                       No (Proceed to #7)

- a. If yes, date of transfer: \_\_\_\_\_  
 b. Fair market value of realty: \$ \_\_\_\_\_ Enter amount on line 10b

7. ITO BA AY PAGLILIPAT NA SANGKOT ANG ISANG LEGAL ENTITY/TRUST NA ANG PROPORTIONAL NA PAG-AARI AY NANANATILING KAPAREHO BAGO AT PAGKATAPOS NG PAGLILIPAT?

- Oo (Walang babayarang buwis)  Hindi (Pumunta sa #8)

*Note: Ang paglilipat na kasangkot ng legal entity/trust na ang claim sa proportional interest exemption ay kailangang magbigay ng formation documents, tulad ng LLC Operating Agreement, Partnership Agreement, Certificate of Shareholders, atbp. Sa lahat ng kaso sa halip na ang paglilipat sa trust ng indibiduwal kung saan ang pangalan ng trust ay may pangalan ng indibiduwal.*

8. ITO BA AY REGALO SA KABUUAN O BAHAGI?

- Oo (Kumpletuhin ang sksiyong ito)  Hindi (Pumunta sa #9)  
 Regalo  Mana  Idagdag/Palitan ang co-signer  Iba Pa \_\_\_\_\_

Petsa ng Paglipat/Petsa ng Kamatayan: \_\_\_\_\_

Pangalan ng Taong Grantor/Nilipatan/Namatay: \_\_\_\_\_

Pangalan ng Tagabigay/Tagatanggan: \_\_\_\_\_

Halagang ibinayad sa kahit na anong bahagi ng inilipat na lupa: \$ \_\_\_\_\_; ipasok ang halaga sa Line 10a

9. DO YOU CONTEND THAT NO TRANSFER TAX IS DUE FOR A REASON NOT EXPLAINED ABOVE?

- No (Proceed to #10)  
 Oo – Magbigay ng kumpletong dahilan kung bakit sinasabi mo na walang babayarang transfer tax (gumamit ng karagdagang papeles kung kailangan).

\_\_\_\_\_  
 \_\_\_\_\_

10. TAXABLE TRANSACTIONS

Complete the following and calculate taxes below:

- a. Consideration Paid \$ \_\_\_\_\_  
 (Including value of any lien or encumbrance remaining thereon at the time of transfer)  
 b. Fair Market Value \$ \_\_\_\_\_  
 c. Documentary Transfer Tax (Payment Due) \$ \_\_\_\_\_

TRANSFER TAX - Imposed per Article 12-C of San Francisco Business and Tax Regulations Code	
If entire consideration or value is:	Tax rate for entire consideration or value is:
More than \$100 but less than/equal to \$250,000	\$2.50 for each \$500 or portion thereof
More than \$250,000 but less than \$1,000,000	\$3.40 for each \$500 or portion thereof
\$1,000,000 or more but less than \$5,000,000	\$3.75 for each \$500 or portion thereof
\$5,000,000 or more but less than \$10,000,000	\$11.25 for each \$500 or portion thereof
\$10,000,000 or more but less than \$25,000,000	\$27.50 for each \$500 or portion thereof
\$25,000,000 or more	\$30.00 for each \$500 or portion thereof

*Note: The maximum tax rate for qualified transfers under the Community Opportunity to Purchase Act is \$3.75 per \$500 or portion thereof, per §1108.6 of Article 12-C of San Francisco Business and Tax Regulations Code.*

11. CONTACT INFORMATION

- a. Name of contact person: \_\_\_\_\_
  - b. Telephone number: \_\_\_\_\_
  - c. Mailing address: \_\_\_\_\_
- 

I DECLARE OR AFFIRM UNDER PENALTY OF PERJURY THAT THE FOREGOING IS TRUE AND CORRECT.

\_\_\_\_\_  
Signature of Filer

\_\_\_\_\_  
Print Name at Pamagat of Filer

\_\_\_\_\_  
Place of Execution (City, County, State)

\_\_\_\_\_  
Date of Execution