

LDA Document Services

California Property Transfer Document Intake

12544 High Bluff Dr., Ste 200 | San Diego, CA 92130 | Phone: 858-792-3403



California Property Transfer Document Intake

Please complete this intake as thoroughly as possible so the requested California property transfer documents can be prepared accurately.

Document preparation only. This form is not legal or tax advice. Title, vesting, reassessment, transfer tax, probate, trust, and lender issues may require review by an attorney, CPA, title officer, or escrow professional.

1. Client / Order Information

Date intake completed	_____
Prepared for / client name(s)	_____
Primary phone number	_____
Email address	_____
Mailing address	_____
Preferred contact method	☐ Phone ☐ Email ☐ Text
Requested completion date	_____
How did the client hear about us?	_____

2. Property Information

Property street address	_____
City / State / ZIP	_____
County where property is located	_____
Assessor Parcel Number (APN)	_____
Type of property	☐ Single-family ☐ Condo ☐ Townhome ☐ Duplex ☐ Vacant land ☐ Other: _____
Current use of property	☐ Primary residence ☐ Rental ☐ Second home ☐ Vacant ☐ Other: _____
Occupancy after transfer	☐ Owner-occupied ☐ Tenant-occupied ☐ Vacant

Legal description source (attach deed, title report, or property record):

3. Current Owner / Grantor Information

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List all current owners exactly as shown on the current deed.

Current owner / grantor #1 full legal name:

Current owner / grantor #1 marital status (if applicable):

Current owner / grantor #2 full legal name:

Current owner / grantor #2 marital status (if applicable):

Additional current owners, if any:

Current vesting language exactly as shown on title:

Do all current owners consent to the transfer? ☐ Yes ☐ No If no, explain:

4. New Owner / Grantee Information

List each new owner exactly as the name should appear on the new deed.

New owner / grantee #1 full legal name:

New owner / grantee #1 mailing address:

New owner / grantee #1 marital status (if applicable):

New owner / grantee #2 full legal name:

New owner / grantee #2 mailing address:

New owner / grantee #2 marital status (if applicable):

Additional new owners, if any:

5. Type of Transfer Requested

☐ Grant Deed

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- ☐ Quitclaim Deed
- ☐ Interspousal Transfer Deed
- ☐ Transfer to Revocable Living Trust
- ☐ Transfer from Revocable Living Trust
- ☐ Gift transfer
- ☐ Sale / buyout between family members or co-owners
- ☐ Adding an owner to title
- ☐ Removing an owner from title
- ☐ Corrective deed / name correction
- ☐ Transfer due to divorce or judgment
- ☐ Other: _____

Briefly describe the purpose of the transfer:

6. Desired Vesting After Transfer

Indicate how the new owner(s) want title held after the transfer.

- ☐ Sole owner
- ☐ Joint tenants
- ☐ Tenants in common (specify percentage interests)
- ☐ Community property
- ☐ Community property with right of survivorship
- ☐ Trustee(s) of a revocable living trust
- ☐ Other vesting language (specify): _____

If tenants in common, percentage interests:

If title will be held in a trust, full trust name and date:

Trustee name(s): _____

7. Transfer Tax / Exemption Information

Documentary Transfer Tax

- ☐ No money is being paid / no consideration
- ☐ Transfer is a gift

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- ☐ Transfer is between spouses or former spouses
- ☐ Transfer is to or from a revocable living trust
- ☐ Transfer confirms or changes the manner in which title is held
- ☐ Transfer is a bona fide sale
- ☐ Other exemption or reason: _____

If consideration is being paid, state amount:

If the transfer tax will be based on value, state value/price:

Requested documentary transfer tax language or exemption language (if known):

8. Loan / Encumbrance Information

Is there an existing mortgage or deed of trust?	☐ Yes ☐ No
If yes, lender / servicer name	_____
Loan number (last 4 digits only)	_____
Approximate unpaid balance	_____
Any HELOC, judgment lien, HOA lien, or tax lien?	☐ Yes ☐ No If yes, explain: _____
Has the client been advised to confirm any lender issues?	☐ Yes ☐ No

9. Preliminary Change of Ownership Report (PCOR) / Reassessment Screening

These questions help determine whether additional transfer or tax-related forms may be needed.

- ☐ Is this a parent-to-child transfer?
- ☐ Is this a child-to-parent transfer?
- ☐ Is this a transfer between spouses or registered domestic partners?
- ☐ Is this a transfer into or out of a revocable living trust where beneficial ownership remains the same?
- ☐ Is this transfer due to death, inheritance, or administration of an estate?
- ☐ Is this a transfer resulting from divorce, legal separation, or property settlement?
- ☐ Will any person remain on title before and after the transfer?
- ☐ Will there be any change in beneficial ownership?

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- ☐ Is any money changing hands?
- ☐ Is the property currently receiving a homeowner's exemption?

If yes to any of the above, explain:

Has the client been advised to obtain tax or reassessment advice if needed? ☐ Yes ☐ No

10. Transfer-Specific Supplemental Questions

A. Transfer to or from Revocable Living Trust

Name of trust: _____

Date of trust: _____

Current trustee(s): _____

How should title vest in the trustee(s) on the deed?:

Trust certification / excerpt attached? ☐ Yes ☐ No

B. Interspousal / Domestic Partner Transfer

Relationship of parties: _____

Reason for transfer (estate planning, refinance, divorce settlement, gift, etc.):

Any pending dissolution or judgment? ☐ Yes ☐ No If yes, explain:

C. Sale / Buyout / Co-owner Transfer

Purchase price or buyout amount:

Will escrow or title documents be involved? ☐ Yes ☐ No

Is there a written agreement supporting this transfer? ☐ Yes ☐ No

D. Correction / Curative Deed

What is being corrected (name, vesting, legal description, APN, other)?:

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Reference recording information of prior deed, if known:

11. Recorder / Return Address Information

Requested return-to name	
Requested return-to mailing address	
Who should receive the recorded original?	
Who will sign the deed?	
Will signatures be notarized in California?	☐ Yes ☐ No
If outside California, will an out-of-state notary be used?	☐ Yes ☐ No

Special county recording instructions or time-sensitive information:

12. Documents to Collect

- ☐ Most recent recorded deed
- ☐ Title report or vesting deed (if available)
- ☐ Property tax bill or APN verification
- ☐ Trust certification or abstract of trust (if applicable)
- ☐ Marital settlement agreement / judgment (if applicable)
- ☐ Death certificate / probate papers / court order (if applicable)
- ☐ Government ID for signing parties
- ☐ Any lender, title, or escrow instructions (if applicable)

13. Client Acknowledgment

- ☐ I understand that LDA Document Services provides document preparation services only and is not providing legal representation.
- ☐ I understand that questions involving legal rights, tax consequences, title defects, probate, trust administration, reassessment, or due-on-sale issues may require advice from a licensed attorney, CPA, lender, or title officer.

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☐ I understand that recording requirements and transfer tax/reassessment issues can vary by county and by the facts of the transfer.

☐ I confirm that the information I provided is true and complete to the best of my knowledge.

Client signature: _____

Print name: _____

Date: _____

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14. LDA Office Use Only – Internal Preparation Checklist

- ☐ Confirm county where property is located
- ☐ Verify current vesting from recorded deed
- ☐ Verify APN and legal description
- ☐ Confirm deed type requested
- ☐ Confirm exact grantee vesting language
- ☐ Review documentary transfer tax language / exemption basis
- ☐ Determine whether PCOR is needed and complete intake support
- ☐ Check for trust documentation if trust transfer
- ☐ Check whether notary instructions are needed
- ☐ Confirm return address and who receives recorded original
- ☐ Flag legal/tax/title questions for referral to attorney, CPA, or title company
- ☐ Prepare deed
- ☐ Prepare PCOR or county supplemental form, if requested
- ☐ Prepare cover sheet / recording instructions, if needed
- ☐ Final review before client signing

Notes: _____
