

LIST OF EXHIBITS

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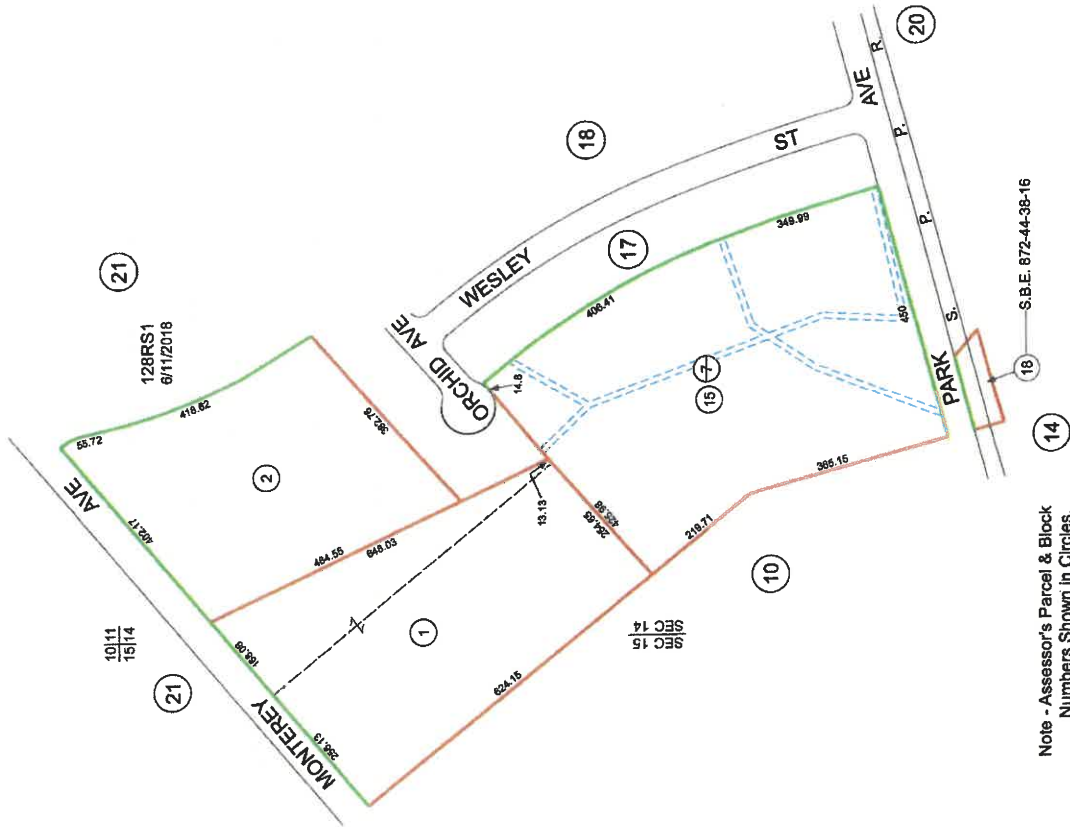
EXHIBIT A
Santa Cruz County Assessor's Map Depicting District Parcel (APN 036-151-01) and City
Parcel (APN 036-151-02)

FOR TAX PURPOSES ONLY
 THE ASSESSOR MAKES NO GUARANTEE AS TO MAP ACCURACY NOR ASSUMES ANY LIABILITY FOR OTHER USES. NOT TO BE REPRODUCED. ALL RIGHTS RESERVED.
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CITY OF CAPITOLA

Tax Area Code
 3-106

36-15



Note - Assessor's Parcel & Block Numbers Shown in Circles.

S.B.E. 672-44-38-16

Assessor's Map No. 36-15
 City of Capitola
 County of Santa Cruz, Calif.

Electronically drawn 1/17/97 CB
 Rev# 4/14/98 CB (CA Consolidation)
 Rev# 4/23/01 rmm (changed page rate)
 Rev# 1/30/05 mnd (patial adjustment)
 Rev# 8/20/19 CB (128RS1)

EXHIBIT B
Aerial Map of City Exchange Property (blue) and District Exchange Property (orange)



EXHIBIT C
Legal Descriptions and Diagrams of District Exchange Property
(Transfer Areas A and C)

TRANSFER AREA - A

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the Soquel Union Elementary School District, December 17th, 1956, at Grant Deed Volume 1107 of Official Records, Page 318, and March 28th, 1951, Grant Deed Volume 816 of Official Records, Page 139, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

COMMENCING at a street centerline monument at the intersection of Monterey Avenue and Cabrillo Street, as shown on the record of survey on file in Volume 128 of Maps, at Page 1, in the Office of the County Recorder, Santa Cruz County, California, from which a street centerline monument at the angle point in Monterey Avenue bears, South 49°20'30" West, a distance of 1086.38 feet; thence South 49°20'30" West, along the centerline of Monterey Avenue, a distance of 526.00 feet; thence South 40°39'30" East, a distance of 25.00 feet to the Southeasterly right-of-way of said Monterey Avenue, same being a point on the property line between Soquel Union Elementary School District and the City of Capitola; thence South 26°08'00" East, along said property line, a distance of 450.61 feet to the **POINT OF BEGINNING**;

Thence continuing South 26°08'00" East, along said property line, a distance of 28.87 feet to the Northwest corner of "Tract No. 190 Seaview Park Unit No. 1" on file in Volume 37 of Maps, at Page 26, in the office of the County Recorder, Santa Cruz County, California; thence South 26°10'17" East, along the Westerly boundary of said Tract No. 190, a distance 163.46 feet to the Southeasterly boundary of the lands of Soquel Union Elementary School District; thence South 49°48'30" West, along said Southeasterly boundary, a distance of 15.46 feet; thence North 26°10'13" West, departing said Southeasterly boundary, a distance of 172.06 feet; thence North 05°50'47" East, a distance of 28.32 feet to the **POINT OF BEGINNING**. and

CONTAINING 2,733 square feet, more or less.

See EXHIBIT A, attached hereto, and by this reference made a part hereof.

END OF DESCRIPTION.

Vernon C. Little, PLS
GV Land Surveying



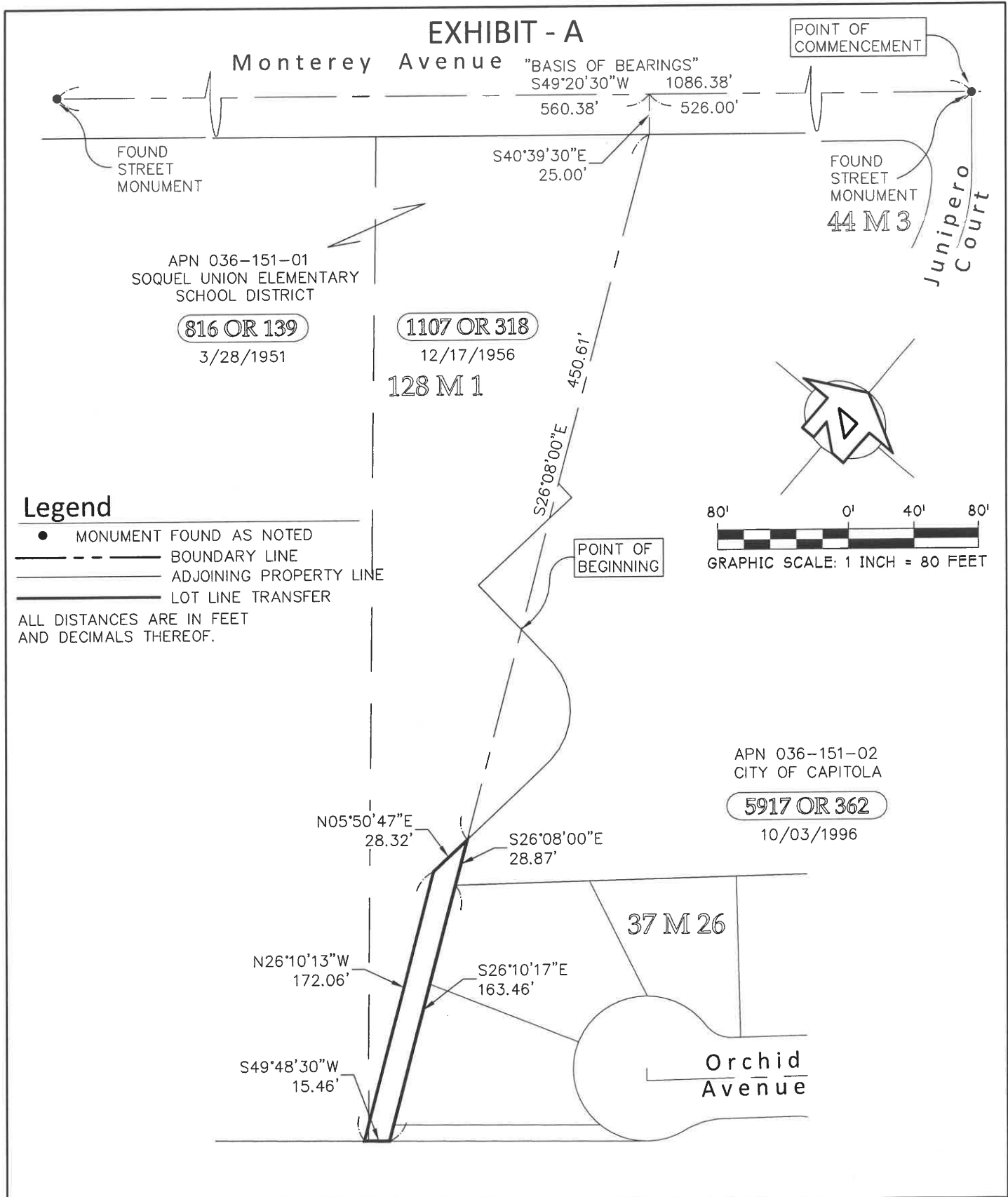


GV Land Surveying

4113 Scotts Valley Drive, Suite 102
Scotts Valley, CA 95066
gvlandsurveying.com

JOB NO. 23084
SHEET NO. 1 OF 1
CALCULATED BY VCL DATE 4/30/2024
SCALE: 1"=80'

EXHIBIT - A



Legend

- MONUMENT FOUND AS NOTED
- BOUNDARY LINE
- ADJOINING PROPERTY LINE
- LOT LINE TRANSFER

ALL DISTANCES ARE IN FEET AND DECIMALS THEREOF.

TRANSFER AREA - C

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the Soquel Union Elementary School District, December 17, 1956, at Grant Deed Volume 1107 of Official Records, Page 318, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence continuing South 26°08'00" East, along said property line, a distance of 71.09 feet; thence North 84°10'38" West, departing said property line, a distance of 38.24 feet; thence North 06°24'33" East, a distance of 60.32 feet to the **POINT OF BEGINNING**. and

CONTAINING 1,153 square feet, more or less.

See EXHIBIT C, attached hereto, and by this reference made a part hereof.

END OF DESCRIPTION.

Vernon C. Little, PLS
GV Land Surveying





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EXHIBIT - C

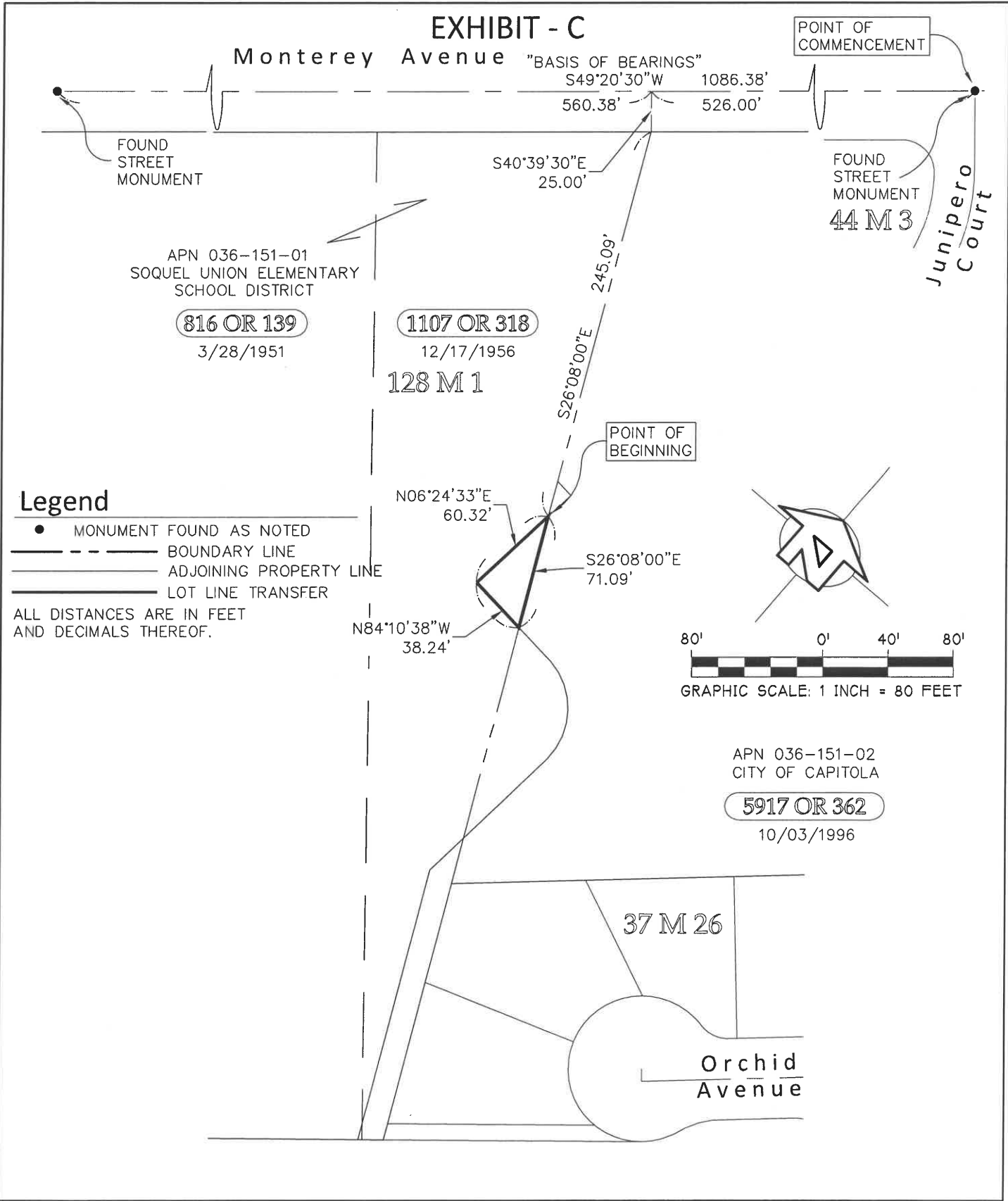


EXHIBIT D
Legal Descriptions and Diagrams of City Exchange Property
(Transfer Areas B and D)

TRANSFER AREA - B

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the City of Capitola, October 3rd, 1996, at Grant Deed Volume 5917 of Official Records, Page 362, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence South 84°10'38 East, departing said property line, a distance of 26.00 feet to the beginning of a curve to the right having a radius of 45.17 feet; thence Southerly along said curve through a central angle of 90°02'09", a distance of 70.98 feet; thence South 05°50'47" West, a distance of 68.87 feet to the aforementioned property line; thence North 26°08'00" West, along said property line, a distance of 134.43 feet to the **POINT OF BEGINNING**. and

CONTAINING 3,624 square feet, more or less.

See EXHIBIT B, attached hereto, and by this reference made a part hereof.

END OF DESCRIPTION.

Vernon C. Little, PLS
GV Land Surveying



4113 Scotts Valley Drive, #102 Scotts Valley, CA 95066

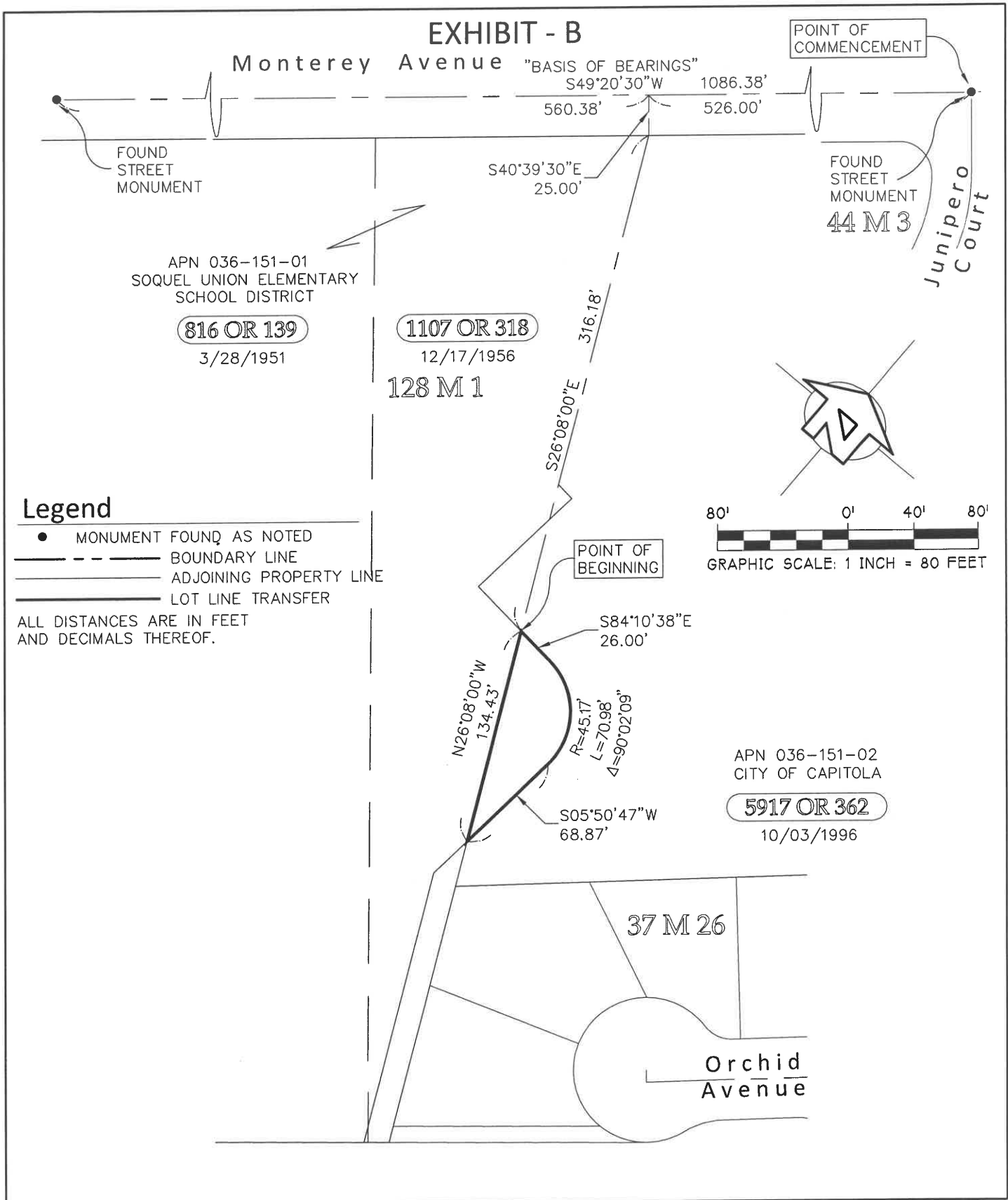


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EXHIBIT - B



TRANSFER AREA - D

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the City of Capitola, October 3rd, 1996, at Grant Deed Volume 5917 of Official Records, Page 362, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence South 83°35'27" East, departing said property line, a distance of 11.97 feet; thence South 06°24'33" West, a distance of 18.76 feet to the aforementioned property line; thence North 26°08'00" West, along said property line, a distance of 22.26 feet to the **POINT OF BEGINNING**. and

CONTAINING 112 square feet, more or less.

See EXHIBIT D, attached hereto, and by this reference made a part hereof.

END OF DESCRIPTION.

Vernon C. Little, PLS
GV Land Surveying





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EXHIBIT - D

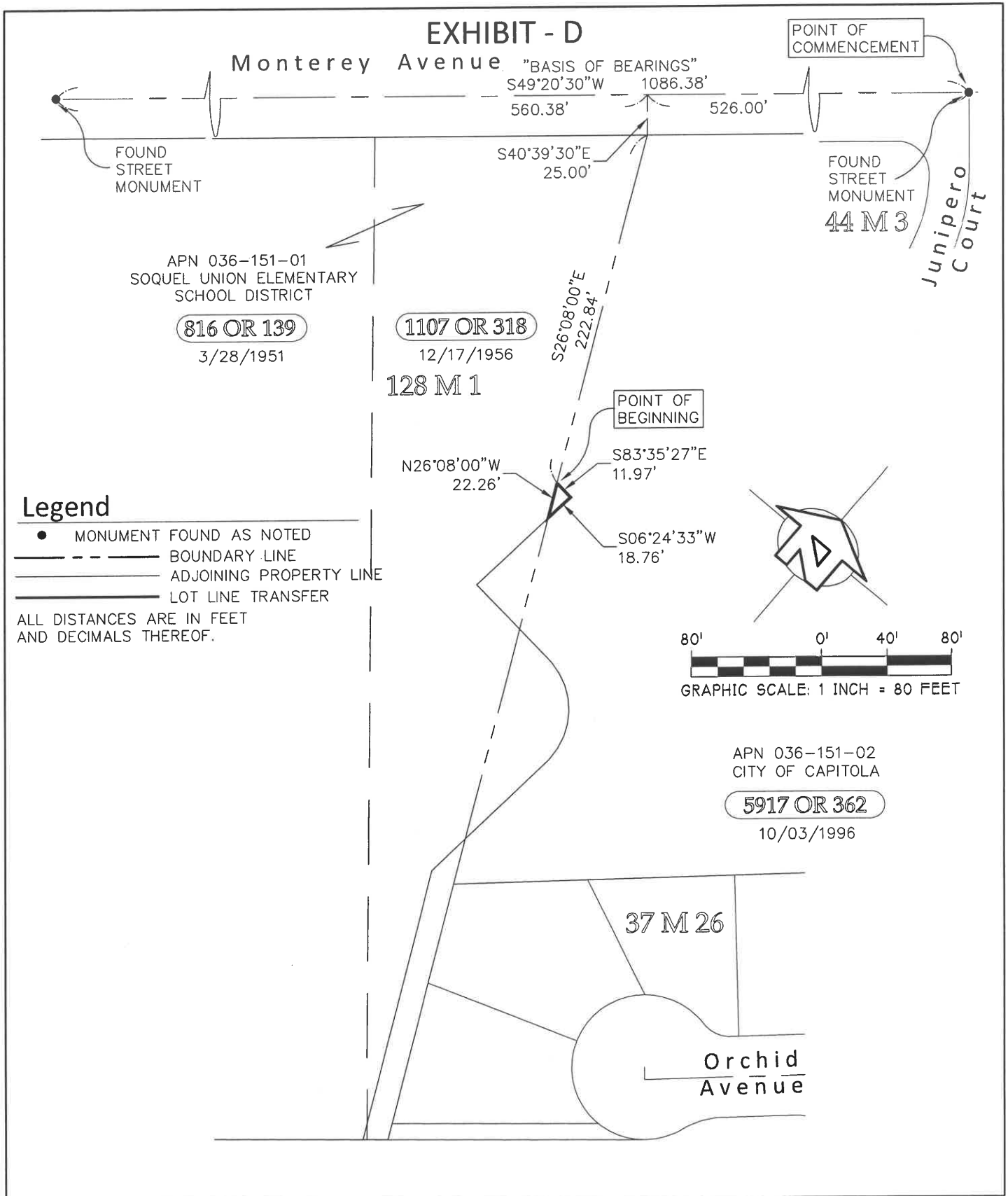


EXHIBIT E
Grant Deed for District Exchange Property

RECORDING REQUESTED BY AND
WHEN RECORDED MAIL TO:

City of Capitola
Attn: Jamie Goldstein, City Manager
420 Capitola Avenue
Capitola, CA 95010

MAIL TAX STATEMENTS TO:

Same as above

Recording of this document is fee-exempt under Government Code Sections 6103 and 27383.
No Documentary Transfer Tax is due on this document pursuant to Revenue and Taxation Code
Section 11922.

GRANT DEED

Assessor's Parcel Number: Portion of 036-151-01

FOR VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,
Soquel Union School District, a Political Subdivision of the State of California, who acquired
title as Soquel Union Elementary School District ("Grantor"), hereby grants to the City of
Capitola ("Grantee"), a municipal corporation, that certain real property in the County of Santa
Cruz, State of California described in and attached hereto as "Exhibit 1" and incorporated herein
(the "Property").

In witness whereof, Grantor has caused this Grant Deed to be executed as of the _____
day of _____, 2024.

Soquel Union Elementary School District

By: Scott Turnbull
Its: Superintendent

NOTARY ACKNOWLEDGEMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA)
)
COUNTY OF _____)

On _____, 2024, before me, _____, Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity, and that by his/her/their signature on the instrument the person, or the entity upon behalf of which the person acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature: _____ (Seal)

EXHIBIT 1
PROPERTY LEGAL DESCRIPTION

(Portions of Assessor's Parcel Number: 036-151-01)

TRANSFER AREA – A

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the Soquel Union Elementary School District, December 17th, 1956, at Grant Deed Volume 1107 of Official Records, Page 318, and March 28th, 1951, Grant Deed Volume 816 of Official Records, Page 139, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence continuing South 26°08'00" East, along said property line, a distance of 28.87 feet to the Northwest corner of "Tract No. 190 Seaview Park Unit No. 1" on file in Volume 37 of Maps, at Page 26, in the office of the County Recorder, Santa Cruz County, California; thence South 26°10'17" East, along the Westerly boundary of said Tract No. 190, a distance 163.46 feet to the Southeasterly boundary of the lands of Soquel Union Elementary School District; thence South 49°48'30" West, along said Southeasterly boundary, a distance of 15.46 feet; thence North 26°10'13" West, departing said Southeasterly boundary, a distance of 172.06 feet; thence North 05°50'47" East, a distance of 28.32 feet to the **POINT OF BEGINNING**. and

CONTAINING 2,733 square feet, more or less.

See EXHIBIT A, attached hereto, and by this reference made a part hereof.

TRANSFER AREA – C

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the Soquel Union Elementary School District, December 17, 1956, at Grant Deed Volume 1107 of Official Records, Page 318, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence continuing South 26°08'00" East, along said property line, a distance of 71.09 feet; thence North 84°10'38" West, departing said property line, a distance of 38.24 feet; thence North 06°24'33" East, a distance of 60.32 feet to the **POINT OF BEGINNING**. and

CONTAINING 1,153 square feet, more or less.

See EXHIBIT C, attached hereto, and by this reference made a part hereof.

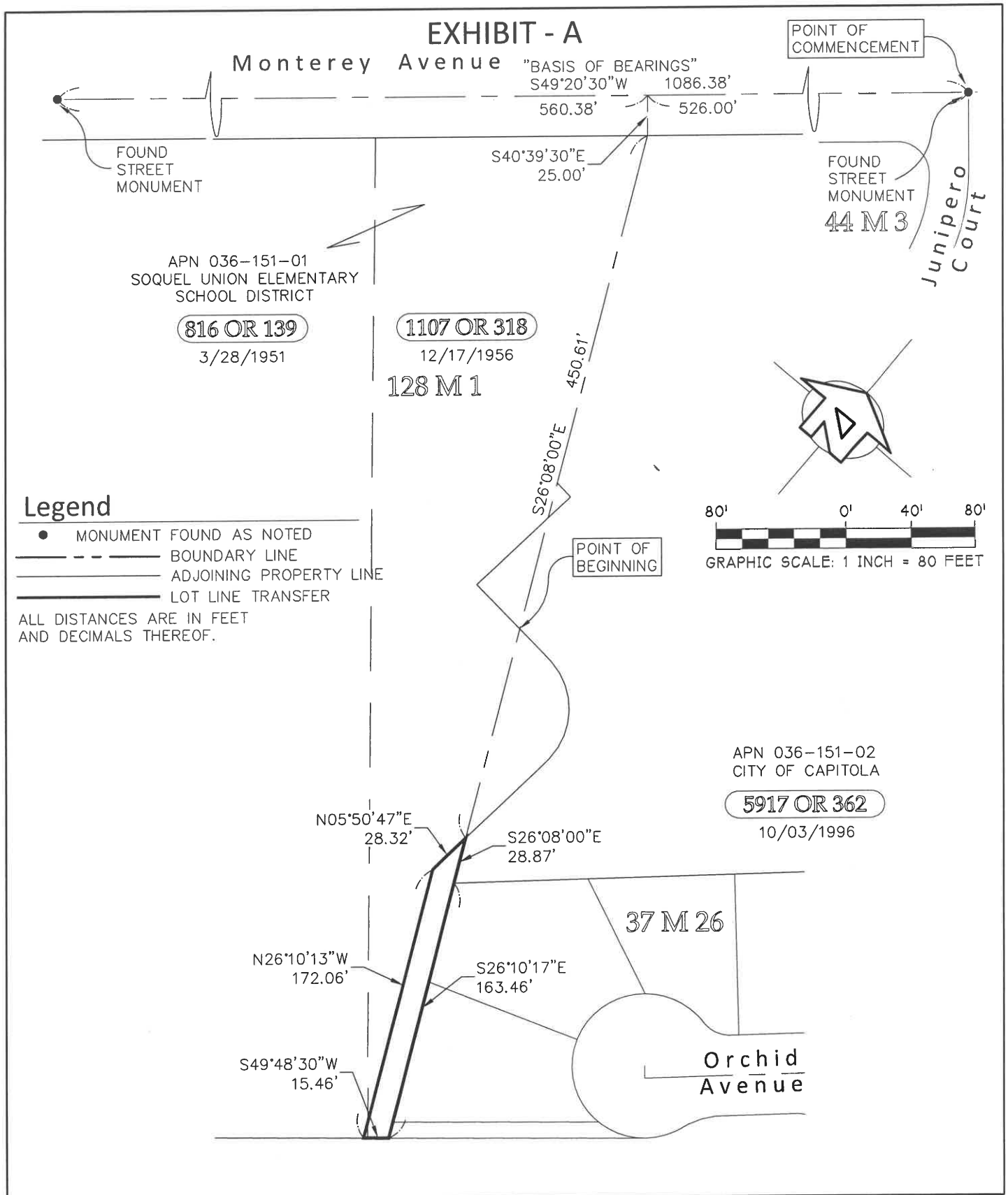


GV Land Surveying

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gvlandsurveying.com

JOB NO. 23084
SHEET NO. 1 OF 1
CALCULATED BY VCL DATE 4/30/2024
SCALE: 1"=80'

EXHIBIT - A





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EXHIBIT - C

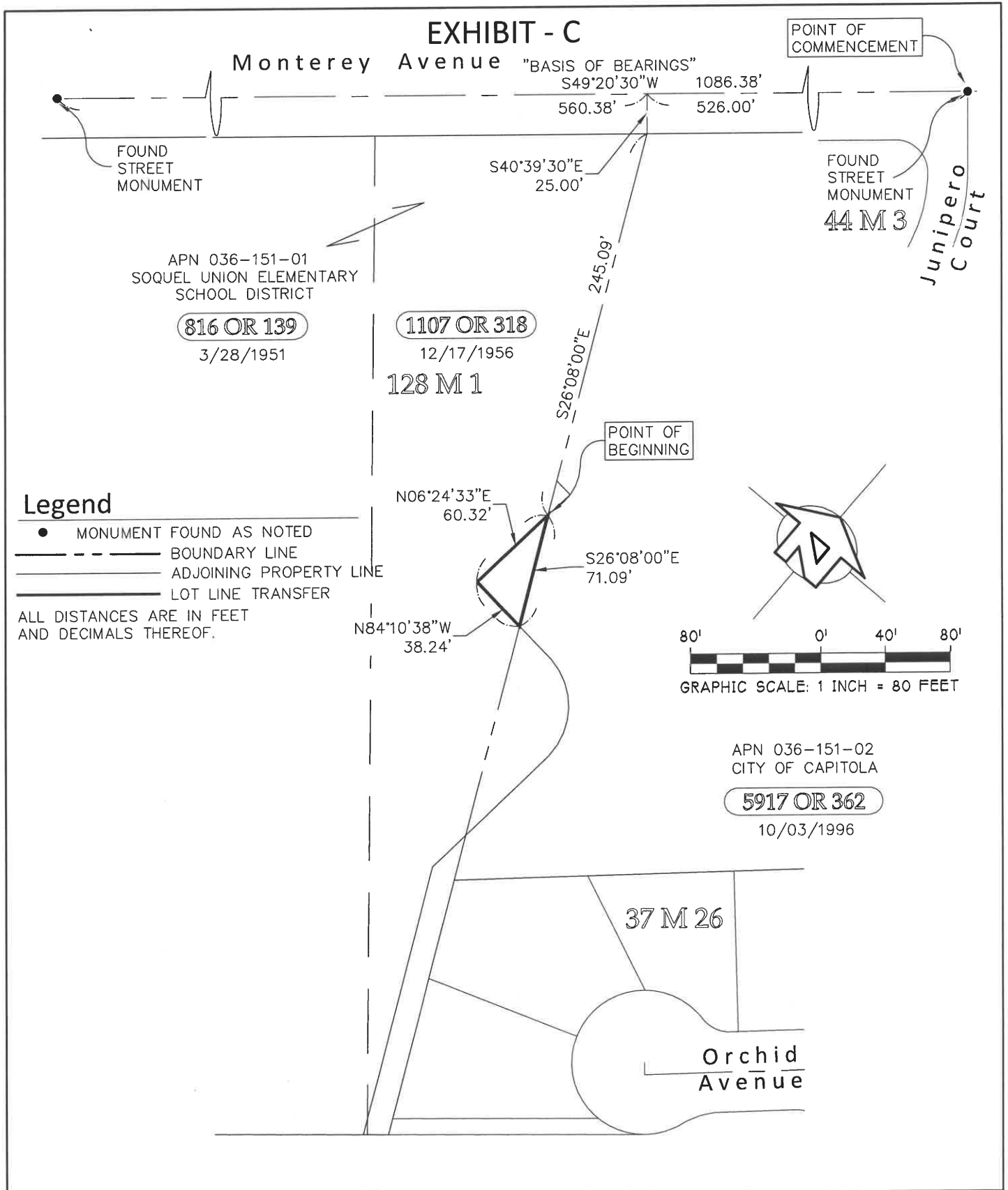


EXHIBIT F

CITY CERTIFICATE OF ACCEPTANCE OF GRANT DEED

This is to certify that the interest in real property conveyed by the Grant Deed dated _____, 2024, from the Soquel Union Elementary School District, a public agency duly organized and existing under the laws of the State of California, to the City of Capitola, a California municipal corporation, is hereby accepted by the undersigned officer on behalf of the City of Capitola pursuant to authority conferred by Resolution No. _____, adopted by the City Council of the City of Capitola on _____, 2024, and the City Council of the City of Capitola consents to the recordation thereof by its duly authorized officer.

Dated: _____

CITY OF CAPITOLA,
a California municipal corporation

By: _____
Name: Jamie Goldstein

Its: City Manager

EXHIBIT G
Grant Deed for City Exchange Property

RECORDING REQUESTED BY AND
WHEN RECORDED MAIL TO:

Soquel Union Elementary School District
Attn: Scott Turnbull, Superintendent
620 Monterey Avenue
Capitola, CA 95010

MAIL TAX STATEMENTS TO:

Same as above

Recording of this document is fee-exempt under Government Code Sections 6103 and 27383.
No Documentary Transfer Tax is due on this document pursuant to Revenue and Taxation Code
Section 11922.

GRANT DEED

Assessor's Parcel Number: Portion of 036-151-02

FOR VALUABLE CONSIDERATION, receipt of which is hereby acknowledged, City of Capitola, a municipal corporation, who acquired title as the City of Capitola ("Grantor"), hereby grants to the Soquel Union Elementary School District, a Political Subdivision of the State of California, that certain real property in the County of Santa Cruz, State of California described in and attached hereto as "Exhibit 1" and incorporated herein (the "Property").

In witness whereof, Grantor has caused this Grant Deed to be executed as of the _____ day of _____, 2024.

City of Capitola

By: Jamie Goldstein
Its: City Manager

NOTARY ACKNOWLEDGEMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA)
)
COUNTY OF _____)

On _____, 2024, before me, _____, Notary Public, personally appeared _____, who proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity, and that by his/her/their signature on the instrument the person, or the entity upon behalf of which the person acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature: _____ (Seal)

EXHIBIT 1
PROPERTY LEGAL DESCRIPTION

(Portion of Assessor's Parcel Number: 036-151-02)

TRANSFER AREA – B

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the City of Capitola, October 3rd, 1996, at Grant Deed Volume 5917 of Official Records, Page 362, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

COMMENCING at a street centerline monument at the intersection of Monterey Avenue and Cabrillo Street, as shown on the record of survey on file in Volume 128 of Maps, at Page 1, in the Office of the County Recorder, Santa Cruz County, California, from which a street centerline monument at the angle point in Monterey Avenue bears, South 49°20'30" West, a distance of 1086.38 feet; thence South 49°20'30" West, along the centerline of Monterey Avenue, a distance of 526.00 feet; thence South 40°39'30" East, a distance of 25.00 feet to the Southeasterly right-of-way of said Monterey Avenue, same being a point on the property line between Soquel Union Elementary School District and the City of Capitola; thence South 26°08'00" East, along said property line, a distance of 316.18 feet to the **POINT OF BEGINNING**;

Thence South 84°10'38 East, departing said property line, a distance of 26.00 feet to the beginning of a curve to the right having a radius of 45.17 feet; thence Southerly along said curve through a central angle of 90°02'09", a distance of 70.98 feet; thence South 05°50'47" West, a distance of 68.87 feet to the aforementioned property line; thence North 26°08'00" West, along said property line, a distance of 134.43 feet to the **POINT OF BEGINNING**. and

CONTAINING 3,624 square feet, more or less.

See EXHIBIT B, attached hereto, and by this reference made a part hereof.

TRANSFER AREA - D

SITUATE in the Shoquel Rancho, City of Capitola, County of Santa Cruz, State of California.

Being a portion of the lands granted to the City of Capitola, October 3rd, 1996, at Grant Deed Volume 5917 of Official Records, Page 362, on file in the office of the County Recorder, Santa Cruz County, California, and described as follows:

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Thence South 83°35'27" East, departing said property line, a distance of 11.97 feet; thence South 06°24'33" West, a distance of 18.76 feet to the aforementioned property line; thence North 26°08'00" West, along said property line, a distance of 22.26 feet to the **POINT OF BEGINNING**. and

CONTAINING 112 square feet, more or less.

See EXHIBIT D, attached hereto, and by this reference made a part hereof.



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JOB NO. 23084

SHEET NO. 1 OF 1

CALCULATED BY VCL DATE 4/30/2024

SCALE: 1"=80'

EXHIBIT - B

Monterey Avenue

"BASIS OF BEARINGS"

S49°20'30"W 1086.38'

560.38' 526.00'

POINT OF COMMENCEMENT

FOUND STREET MONUMENT

S40°39'30"E 25.00'

FOUND STREET MONUMENT

44 M 3

Junipero Court

APN 036-151-01
SOQUEL UNION ELEMENTARY
SCHOOL DISTRICT

816 OR 139

3/28/1951

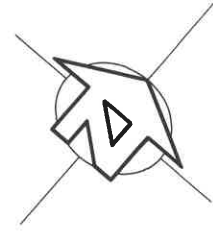
1107 OR 318

12/17/1956

128 M 1

316.18'

S26°08'00"E



80' 0' 40' 80'



GRAPHIC SCALE: 1 INCH = 80 FEET

Legend

- MONUMENT FOUND AS NOTED
- BOUNDARY LINE
- ADJOINING PROPERTY LINE
- LOT LINE TRANSFER

ALL DISTANCES ARE IN FEET AND DECIMALS THEREOF.

POINT OF BEGINNING

S84°10'38"E 26.00'

N26°08'00"W 134.43'

R=45.17'
L=70.98'
Δ=90°02'09"

S05°50'47"W 68.87'

APN 036-151-02
CITY OF CAPITOLA

5917 OR 362

10/03/1996

37 M 26

Orchid Avenue

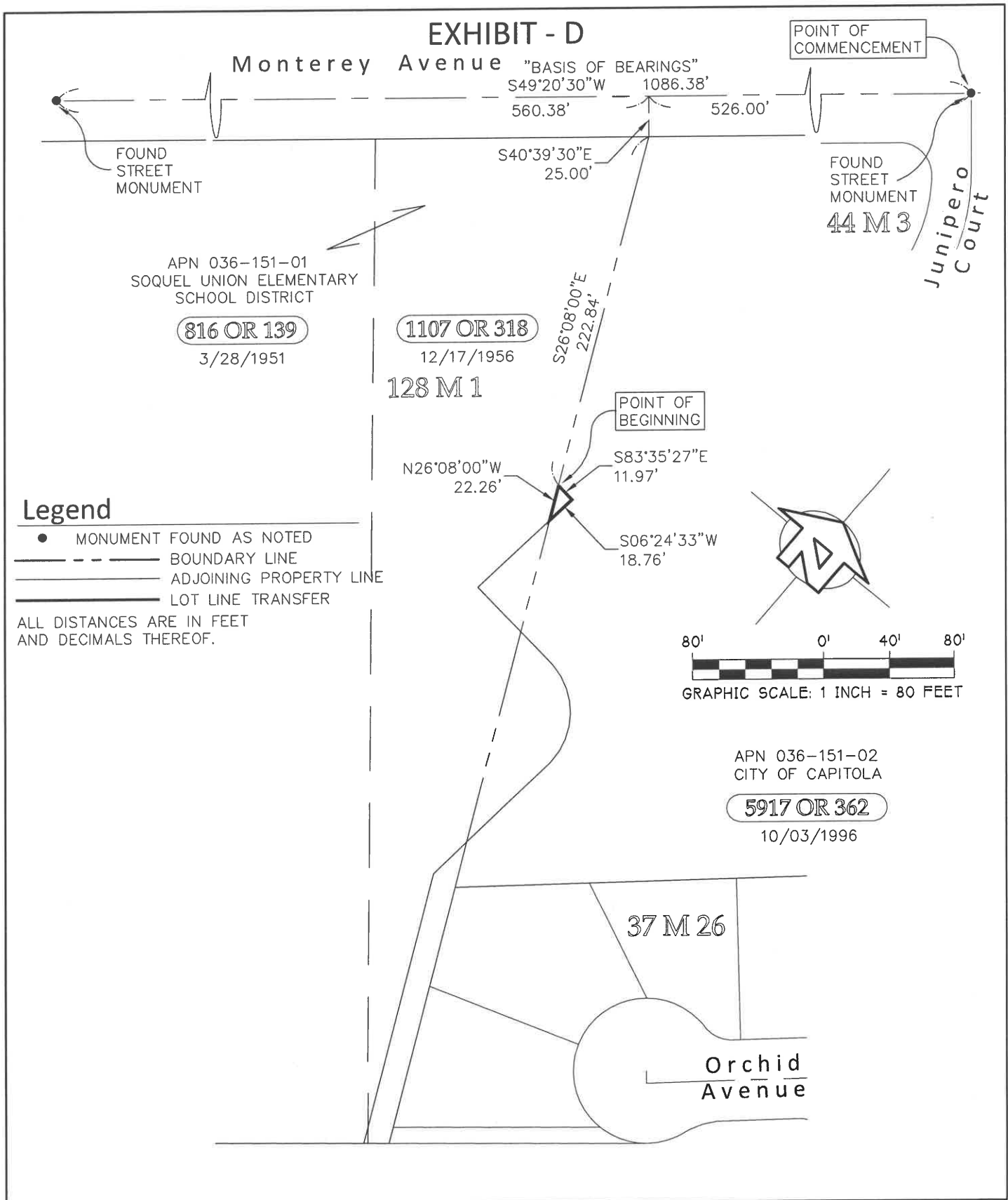


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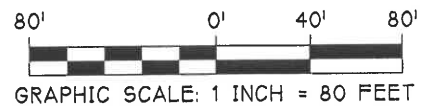
EXHIBIT - D



Legend

- MONUMENT FOUND AS NOTED
- BOUNDARY LINE
- ADJOINING PROPERTY LINE
- LOT LINE TRANSFER

ALL DISTANCES ARE IN FEET AND DECIMALS THEREOF.



APN 036-151-02
CITY OF CAPITOLA

5917 OR 362
10/03/1996

37 M 26

Orchid Avenue

EXHIBIT H

DISTRICT CERTIFICATE OF ACCEPTANCE OF GRANT DEED

This is to certify that the interest in real property conveyed by the Grant Deed dated _____, 2024, from the City of Capitola, a municipal corporation, to the Soquel Union Elementary School District, a public agency duly organized and existing under the laws of the State of California, is hereby accepted by the undersigned officer on behalf of the Soquel Union Elementary School District pursuant to authority conferred by the California Constitution and California Education Code sections 1040, *et seq.*, and the Soquel Union Elementary School District consents to the recordation thereof by its duly authorized officer.

Dated: _____

SOQUEL UNION ELEMENTARY SCHOOL DISTRICT,
a public agency duly organized and existing
under the laws of the State of California

By: _____

Name: Scott Turnbull

Its: Superintendent

EXHIBIT I

FORM OF PRELIMINARY CHANGE OF OWNERSHIP REPORT

PRELIMINARY CHANGE OF OWNERSHIP REPORT

To be completed by the transferee (buyer) prior to a transfer of subject property, in accordance with section 480.3 of the Revenue and Taxation Code. A Preliminary Change of Ownership Report must be filed with each conveyance in the County Recorder's office for the county where the property is located.

NAME AND MAILING ADDRESS OF BUYER/TRANSFeree
(Make necessary corrections to the printed name and mailing address)

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ASSESSOR'S PARCEL NUMBER

SELLER/TRANSFEROR

BUYER'S DAYTIME TELEPHONE NUMBER

()

BUYER'S EMAIL ADDRESS

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J

STREET ADDRESS OR PHYSICAL LOCATION OF REAL PROPERTY

YES NO This property is intended as my principal residence. If YES, please indicate the date of occupancy or intended occupancy.

MO	DAY	YEAR

YES NO Are you a 100% rated disabled veteran who was compensated at 100% by the Department of Veterans Affairs or an unmarried surviving spouse of a 100% rated disabled veteran?

MAIL PROPERTY TAX INFORMATION TO (NAME)

MAIL PROPERTY TAX INFORMATION TO (ADDRESS)

CITY

STATE ZIP CODE

PART 1. TRANSFER INFORMATION *Please complete all statements.*

This section contains possible exclusions from reassessment for certain types of transfers.

YES NO

- A. This transfer is solely between spouses (*addition or removal of a spouse, death of a spouse, divorce settlement, etc.*).
- B. This transfer is solely between domestic partners currently registered with the California Secretary of State (*addition or removal of a partner, death of a partner, termination settlement, etc.*).
- *C. This is a transfer: between parent(s) and child(ren) between grandparent(s) and grandchild(ren).
Was this the transferor/grantor's principal residence? YES NO
Is this a family farm? YES NO
- *D. This transfer is the result of a cotenant's death. Date of death _____
- *E. This transaction is to replace a principal residence owned by a person 55 years of age or older.
- *F. This transaction is to replace a principal residence by a person who is severely disabled.
- *G. This transaction is to replace a principal residence substantially damaged or destroyed by a wildfire or natural disaster for which the Governor proclaimed a state of emergency.
- H. This transaction is only a correction of the name(s) of the person(s) holding title to the property (*e.g., a name change upon marriage*).
If YES, please explain: _____
- I. The recorded document creates, terminates, or reconveys a lender's interest in the property.
- J. This transaction is recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security interest (*e.g., cosigner*). If YES, please explain: _____
- K. The recorded document substitutes a trustee of a trust, mortgage, or other similar document.
- L. This is a transfer of property:
 - 1. to/from a revocable trust that may be revoked by the transferor and is for the benefit of the transferor, and/or the transferor's spouse registered domestic partner.
 - 2. to/from an irrevocable trust for the benefit of the creator/grantor/trustor and/or grantor's/trustor's spouse grantor's/trustor's registered domestic partner.
- M. This property is subject to a lease with a remaining lease term of 35 years or more including written options.
- N. This is a transfer between parties in which proportional interests of the transferor(s) and transferee(s) in each and every parcel being transferred remain exactly the same after the transfer.
- O. This is a transfer subject to subsidized low-income housing requirements with governmentally imposed restrictions, or restrictions imposed by specified nonprofit corporations.
- *P. This transfer is to the first purchaser of a new building containing a leased owned active solar energy system.
- Q. Other. This transfer is to _____

* Please refer to the instructions for Part 1.

Please provide any other information that will help the Assessor understand the nature of the transfer.

PART 2. OTHER TRANSFER INFORMATION

Check and complete as applicable.

- A. Date of transfer, if other than recording date: _____
- B. Type of transfer:
- Purchase Foreclosure Gift Trade or exchange Merger, stock, or partnership acquisition (Form BOE-100-B)
 - Contract of sale. Date of contract: _____ Inheritance. Date of death: _____
 - Sale/leaseback Creation of a lease Assignment of a lease Termination of a lease. Date lease began: _____
 - Original term in years (including written options): _____ Remaining term in years (including written options): _____
 - Other. Please explain: _____
- C. Only a partial interest in the property was transferred. YES NO If YES, indicate the percentage transferred: _____ %

PART 3. PURCHASE PRICE AND TERMS OF SALE

Check and complete as applicable.

- A. Total purchase price \$ _____
- B. Cash down payment or value of trade or exchange excluding closing costs Amount \$ _____
- C. First deed of trust @ _____ % interest for _____ years. Monthly payment \$ _____ Amount \$ _____
- FHA (____ Discount Points) Cal-Vet VA (____ Discount Points) Fixed rate Variable rate
 - Bank/Savings & Loan/Credit Union Loan carried by seller
 - Balloon payment \$ _____ Due date: _____
- D. Second deed of trust @ _____ % interest for _____ years. Monthly payment \$ _____ Amount \$ _____
- Fixed rate Variable rate Bank/Savings & Loan/Credit Union Loan carried by seller
 - Balloon payment \$ _____ Due date: _____
- E. Was an Improvement Bond or other public financing assumed by the buyer? YES NO Outstanding balance \$ _____
- F. Amount, if any, of real estate commission fees paid by the buyer which are not included in the purchase price \$ _____
- G. The property was purchased: Through real estate broker. Broker name: _____ Phone number: _____
- Direct from seller From a family member-Relationship _____
 - Other. Please explain: _____
- H. Please explain any special terms, seller concessions, broker/agent fees waived, financing, and any other information (e.g., buyer assumed the existing loan balance) that would assist the Assessor in the valuation of your property.

PART 4. PROPERTY INFORMATION

Check and complete as applicable.

- A. Type of property transferred
- Single-family residence Co-op/Own-your-own Manufactured home
 - Multiple-family residence. Number of units: _____ Condominium Unimproved lot
 - Other. Description: (i.e., timber, mineral, water rights, etc.) Timeshare Commercial/Industrial
- B. YES NO Personal/business property, or incentives, provided by seller to buyer are included in the purchase price. Examples of personal property are furniture, farm equipment, machinery, etc. Examples of incentives are club memberships, etc. Attach list if available.
- If YES, enter the value of the personal/business property: \$ _____ Incentives \$ _____
- C. YES NO A manufactured home is included in the purchase price.
- If YES, enter the value attributed to the manufactured home: \$ _____
- YES NO The manufactured home is subject to local property tax. If NO, enter decal number: _____
- D. YES NO The property produces rental or other income.
- If YES, the income is from: Lease/rent Contract Mineral rights Other: _____
- E. The condition of the property at the time of sale was: Good Average Fair Poor
- Please describe: _____

CERTIFICATION

I certify (or declare) that the foregoing and all information hereon, including any accompanying statements or documents, is true and correct to the best of my knowledge and belief.

SIGNATURE OF BUYER/TRANSFeree OR CORPORATE OFFICER	DATE	TELEPHONE ()
NAME OF BUYER/TRANSFeree/PERSONAL REPRESENTATIVE/CORPORATE OFFICER (PLEASE PRINT)	TITLE	EMAIL ADDRESS

ADDITIONAL INFORMATION

Please answer all questions in each section, and sign and complete the certification before filing. This form may be used in all 58 California counties. If a document evidencing a change in ownership is presented to the Recorder for recordation without the concurrent filing of a *Preliminary Change of Ownership Report*, the Recorder may charge an additional recording fee of twenty dollars (\$20).

NOTICE: The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the County Assessor. Supplemental assessments are not paid by the title or escrow company at close of escrow, and are not included in lender impound accounts. **You may be responsible for the current or upcoming property taxes even if you do not receive the tax bill.**

NAME AND MAILING ADDRESS OF BUYER: Please make necessary corrections to the printed name and mailing address. Enter Assessor's Parcel Number, name of seller, buyer's daytime telephone number, buyer's email address, and street address or physical location of the real property.

NOTE: Your telephone number and/or email address is very important. **If there is a question or a problem, the Assessor needs to be able to contact you.**

MAIL PROPERTY TAX INFORMATION TO: Enter the name, address, city, state, and zip code where property tax information should be mailed. This must be a valid mailing address.

PRINCIPAL RESIDENCE: To help you determine your principal residence, consider (1) where you are registered to vote, (2) the home address on your automobile registration, and (3) where you normally return after work. If after considering these criteria you are still uncertain, choose the place at which you have spent the major portion of your time this year. Check YES if the property is intended as your principal residence, and indicate the date of occupancy or intended occupancy.

DISABLED VETERAN: If you checked YES, you may qualify for a property tax exemption. **A claim form must be filed and all requirements met in order to obtain the exemption. Please contact the Assessor for a claim form.**

PART 1: TRANSFER INFORMATION

If you check YES to any of these statements, the Assessor may ask for supporting documentation.

C, D, E, F, G: If you checked YES to any of these statements, you may qualify for a property tax reassessment exclusion, which may allow you to maintain your property's previous tax base. **A claim form must be filed and all requirements met in order to obtain any of these exclusions.** Contact the Assessor for claim forms. **NOTE:** If you give someone money or property during your life, you may be subject to federal gift tax. You make a gift if you give property (including money), the use of property, or the right to receive income from property without expecting to receive something of at least equal value in return. The transferor (donor) may be required to file Form 709, Federal Gift Tax Return, with the Internal Revenue Service if they make gifts in excess of the annual exclusion amount.

H: Check YES if the reason for recording is to correct a name already on title [e.g., Mary Jones, who acquired title as Mary J. Smith, is granting to Mary Jones]. This is not for use when a name is being removed from title.

I: Check YES if the change involves a lender, who holds title for security purposes on a loan, and who has no other beneficial interest in the property.

"Beneficial interest" is the right to enjoy all the benefits of property ownership. Those benefits include the right to use, sell, mortgage, or lease the property to another. A beneficial interest can be held by the beneficiary of a trust, while legal control of the trust is held by the trustee.

J: A "**cosigner**" is a third party to a mortgage/loan who provides a guarantee that a loan will be repaid. The cosigner signs an agreement with the lender stating that if the borrower fails to repay the loan, the cosigner will assume legal liability for it.

N: This is primarily for use when the transfer is into, out of, or between legal entities such as partnerships, corporations, or limited liability companies. Check YES only if the individuals and the interest held by each remains exactly the same in each and every parcel being transferred.

O: Check YES only if this property is subject to a government or nonprofit affordable housing program that imposes restrictions. Property may qualify for a restricted valuation method (i.e., may result in lower taxes).

P: If you checked YES, you may qualify for a new construction property tax exclusion. **A claim form must be filed and all requirements met in order to obtain the exclusion. Contact the Assessor for a claim form.**

PART 2: OTHER TRANSFER INFORMATION

A: The date of recording is rebuttably presumed to be the date of transfer. If you believe the date of transfer was a different date (e.g., the transfer was by an unrecorded contract, or a lease identifies a specific start date), put the date you believe is the correct transfer date. If it is not the date of recording, the Assessor may ask you for supporting documentation.

B: Check the box that corresponds to the type of transfer. If OTHER is checked, please provide a detailed description. Attach a separate sheet if necessary.

C. If this transfer was the result of an inheritance following the death of the property owner, please complete a *Change in Ownership Statement, Death of Real Property Owner*, form BOE-502-D, if not already filed with the Assessor's office.

PART 3: PURCHASE PRICE AND TERMS OF SALE

It is important to complete this section completely and accurately. The reported purchase price and terms of sale are important factors in determining the assessed value of the property, which is used to calculate your property tax bill. Your failure to provide any required or requested information may result in an inaccurate assessment of the property and in an overpayment or underpayment of taxes.

A. Enter the total purchase price, not including closing costs or mortgage insurance.

"Mortgage insurance" is insurance protecting a lender against loss from a mortgagor's default, issued by the FHA or a private mortgage insurer.

B. Enter the amount of the down payment, whether paid in cash or by an exchange. If through an exchange, exclude the closing costs.

"Closing costs" are fees and expenses, over and above the price of the property, incurred by the buyer and/or seller, which include title searches, lawyer's fees, survey charges, and document recording fees.

C. Enter the amount of the First Deed of Trust, if any. Check all the applicable boxes, and complete the information requested.

A **"balloon payment"** is the final installment of a loan to be paid in an amount that is disproportionately larger than the regular installment.

D. Enter the amount of the Second Deed of Trust, if any. Check all the applicable boxes, and complete the information requested.

E. If there was an assumption of an improvement bond or other public financing with a remaining balance, enter the outstanding balance, and mark the applicable box.

An **"improvement bond or other public financing"** is a lien against real property due to property-specific improvement financing, such as green or solar construction financing, assessment district bonds, Mello-Roos (a form of financing that can be used by cities, counties and special districts to finance major improvements and services within the particular district) or general improvement bonds, etc. Amounts for repayment of contractual assessments are included with the annual property tax bill.

F. Enter the amount of any real estate commission fees paid by the buyer which are not included in the purchase price.

G. If the property was purchased through a real estate broker, check that box and enter the broker's name and phone number. If the property was purchased directly from the seller (who is not a family member of one of the parties purchasing the property), check the "Direct from seller" box. If the property was purchased directly from a member of your family, or a family member of one of the parties who is purchasing the property, check the "From a family member" box and indicate the relationship of the family member (e.g., father, aunt, cousin, etc.). If the property was purchased by some other means (e.g., over the Internet, at auction, etc.), check the "OTHER" box and provide a detailed description (attach a separate sheet if necessary).

H. Describe any special terms (e.g., seller retains an unrecorded life estate in a portion of the property, etc.), seller concessions (e.g., seller agrees to replace roof, seller agrees to certain interior finish work, etc.), broker/agent fees waived (e.g., fees waived by the broker/agent for either the buyer or seller), financing, buyer paid commissions, and any other information that will assist the Assessor in determining the value of the property.

PART 4: PROPERTY INFORMATION

A. Indicate the property type or property right transferred. Property rights may include water, timber, mineral rights, etc.

B. Check YES if personal, business property or incentives are included in the purchase price in Part 3. Examples of personal or business property are furniture, farm equipment, machinery, etc. Examples of incentives are club memberships (golf, health, etc.), ski lift tickets, homeowners' dues, etc. Attach a list of items and their purchase price allocation. An adjustment will not be made if a detailed list is not provided.

C. Check YES if a manufactured home or homes are included in the purchase price. Indicate the purchase price directly attributable to each of the manufactured homes. If the manufactured home is registered through the Department of Motor Vehicles in lieu of being subject to property taxes, check NO and enter the decal number.

D. Check YES if the property was purchased or acquired with the intent to rent or lease it out to generate income, and indicate the source of that anticipated income. Check NO if the property will not generate income, or was purchased with the intent of being owner-occupied.

E. Provide your opinion of the condition of the property at the time of purchase. If the property is in "fair" or "poor" condition, include a brief description of repair needed.