

From: July 27, 2021 Board Meeting - Public Comment
To: Meeting Info
Subject: [External] July 27, 2021 Board Meeting - Public Comment
Date: Monday, July 26, 2021 11:11:14 AM



Public Comment

From: Wendell Phillips
Agenda Item: M1, Proposition 19
Implementation
Meeting Date: 07/27/21

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Agenda Item(s):

K1d (2). Proposition 19 Implementation Project

K4b. Update on legislation related to the Implementation of Proposition 19

M1. Proposition 19 Implementation

Comment:

My name is Wendell Phillips. I am a 10 year licensed real estate professional in California and a Sonoma County resident for 35 years. I was denied a base value transfer per Prop 19 and I need to know what my options are. The following are the details of my property transaction. I consider me and my wife the classic reason Prop 19 passed. We were "trapped" in our home due to the exorbitant property tax increase we would need to pay to "modestly move up" in the housing market in Sonoma County after living in our home we purchased in 1996 and lived in 24 years until 11/24/2020 when we sold it after the passage of Prop 19. 1. My wife and I are both over the age of 55. My wife is 58 and I will be 61. I will be retiring from the workforce in a few short years and my wife shortly after. 2. We moved primarily due to my wife's aging parents who are both in their upper 80s and in declining health. My wife needed to be closer to her parents to continually check on them. 3. On 12/4/2020 we purchased a primary home [REDACTED] about 3 blocks from my wife's parents home and about a mile away from our home we sold on [REDACTED]. 4. My understanding at the time of the passage of Prop 19 was that both transactions would need to occur after the passage of Prop 19. Since my denial of my base value transfer from the Sonoma County Assessor I have learned of the operative date of April 1, 2021 that one of the the transactions must occur after. I don't know why this random date exists or for what reason. If this is truly the case and I cannot and will not be able to transfer my tax base value because one of the transactions did not occur after April 1, 2021 I need to know what my options are. So the following are three questions I need answers on. 1. Will the requirement of one of the transactions occurring after April 1, 2021 be changed to allow all transactions that occurred after the passage of Prop 19 in November 2020? I know this Prop is new and details are still getting hashed out but this is an important question I need answered. 2. If the requirement of one of the transactions must occur after April 1, 2021 will stay enforced I will need to know the answer to this question. There is a provision in Prop 19 that requires the sale and purchase to occur within two years of each other. Since I sold Golf Course on 11/24/2020 can I sell the home I purchased on Dawn Dr. 12/4/2020 and purchase a different home within the two year period and transfer my tax base value from Golf Course home to the home I purchase after selling Dawn Dr. home? Essentially nullifying the purchase of Dawn Dr. and purchasing a home after April 1, 2021 to comply with the rule of one of the transactions occurring after April 1, 2021 but within the two year period. 3. I have an assessment appeal with the Sonoma County Assessors office in a plea to allow my base value transfer. If the appeal fails and the base value transfer is denied can I then re-apply for a second assessment appeal after seeking legal counsel? This is not the course of action I would prefer but need to know if I need to cancel the current appeal before I seek legal counsel. I just don't know what to do and cannot

throw away living in a home 24 years waiting for property tax relief only to find out now that one of the transactions must occur after April 1, 2021 per Prop 19. With retirement in the very near future I don't believe I would be able to afford the home I just purchased. Any help, information or assistance on the matter would be greatly appreciated. I do plan on dialing into the meeting tomorrow July 27 for public comment. Thank you Wendell Phillips