

**From:** August 29-30, 2023 Board Meeting - Public Comment  
**To:** Meeting Info  
**Subject:** [External] August 29-30, 2023 Board Meeting - Public Comment  
**Date:** Monday, August 28, 2023 10:22:25 PM

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Name: Cheryl Carter

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Agenda Item(s):

12. Veterans' Exemption  
Disabled Veterans' Exemption  
and Homeowners' Exemption Board Work Group Report

Comment:

In June 2021, while all of us were still dealing with the pandemic, my 97 year old father passed away. Upon his passing, my siblings and I inherited my parent's house. With the help of our attorney, I submitted the Homeowners Exemption form along with other related documents to the county. About a year later, to our shock we received a notice from the Assessor's Office indicating that our property would be reassessed. This new assessment increased our property taxes from approx. \$2200/yr. to approx. \$35,000/yr. An amount that is difficult for us to pay. It was at this time that I learned about Proposition 19 and the new changes to inheritance of property. We also discovered that the submission of our Homeowner's Exemption form had been overlooked by the county. Eight months and many phone calls, office visits, conversations with BOE staff and finally asking the Board of Supervisors to intervene on our behalf, things are better, but we remain disappointed with the current assessment. Through this experience, it became clear how people can so easily lose their home. The issue with the Assessor's Office would have had a domino effect for us, affecting the agreement we made with the mortgage company. Selling the house would have been the only option, erasing the legacy our parents left for us. We welcome the opportunity to share the issues my siblings and I would like BOE to address: 1) For BOE to work closely with the state legislature to increase the transition time between voter approval of a proposition affecting inheritance or property tax and implementation of that law so that the public can be fully informed. Prop 19 went into effect roughly 3 ½ months after the vote, 6 months at minimum would have allowed time for public service announcement and for county offices to work out the details. In the case of Prop 19, the ads were misleading, most people were focused on the "crazy" presidential election and then the insurrection occurred. Not an ideal time to implement such an impactful law. 2) Regarding the formula used in the assessment of "Parent to Child Transfer" and the "Grandparent to Grandchild Transfer" of property, please consider updating the "one million dollars" base that was used in Prop 58 (35 years ago) to more contemporary market values (ex. Two million or three million). Home prices in California have increased 700% since 1986 when Prop 58 went into effect. The amended paragraph reads as follows: a. [If the assessed value of the family home upon purchase by, or transfer to, the transferee is equal to or more than the sum of the taxable value described in subparagraph (A) plus one million dollars (\$1,000,000), an amount equal to the assessed value of the family home upon purchase by, or transfer to, the transferee, minus the sum of the taxable value described in subparagraph (A) and one million dollars (\$1,000,000).] 3) We would like to know the criteria and resources the Assessor's Office uses to determine current market value of a home. Thank you for your time.

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