



STATE BOARD OF EQUALIZATION
PROPERTY TAX DEPARTMENT
PO BOX 942879, SACRAMENTO, CALIFORNIA 94279-0064
1-916-274-3350 • FAX 1-916-285-0134
www.boe.ca.gov

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January 8, 2024

TO COUNTY ASSESSORS:

No. 2024/001

PROPERTY TAX FORMS LIST

Enclosed is a listing of property tax forms produced by the State Board of Equalization (BOE) and available for use by County Assessors' offices and local appeals boards. This listing also contains forms used by BOE staff in the implementation of various property tax programs co-administered by the BOE and County Assessors.

In order to assist County Assessors, the BOE posts the forms on its Assessor Portal website, which is only available to the BOE and County Assessors and their staff. These forms are available throughout the year on the Assessor Portal website in a PDF fillable format.

If you have questions regarding property tax forms, you may contact Diana Linehan at 1-916-274-3350 or at BOE-PTForms@boe.ca.gov.

Sincerely,

/s/ David Yeung

David Yeung
Deputy Director
Property Tax Department

DY:ka
Enclosure

PROPERTY TAX FORMS LIST

December 2023

Number	Rev	Date	Classification	R&T Code §	Confidential	Assessor Portal Site	Title
19-B	03	05/23	Prescribed	69.6(g)(1)	Yes	Yes	Claim for Transfer of Base Year Value to Replacement Primary Residence for Persons at Least Age 55 Years
19-C	02	05/23	Prescribed	69.6(g)(1)	Yes	Yes	Certification of Value by Assessor for Base Year Value Transfer
19-D	02	05/22	Prescribed	69.6(g)(1)	Yes	Yes	Claim for Transfer of Base Year Value to Replacement Primary Residence for Severely Disabled Persons
19-DC	02	05/22	Prescribed	69.6(g)(1)	Yes	Yes	Certificate of Disability
19-G	03	05/23	Prescribed	63.2(f)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer Between Grandparent and Grandchild Occurring on or After February 16, 2021
19-P	02	05/23	Prescribed	63.2(f)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer Between Parent and Child Occurring on or After February 16, 2021
19-V	02	05/22	Prescribed	69.6(g)(1)	Yes	Yes	Claim for Transfer of Base Year Value to Replacement Primary Residence for Victims of Wildfire or Other Natural Disaster
19-X	00	11/22	Prescribed	2636.1	Yes	Yes	Request for Property Tax Deferment, Section 69.6 Base Year Value Transfers
58-AH	21	05/22	Prescribed	63.1(e)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer Between Parent and Child
58-G	18	05/22	Prescribed	63.1(e)(1)	Yes	Yes	Claim for Reassessment Exclusion for Transfer From Grandparent to Grandchild
58-H	02	05/20	Prescribed	62.3	No	Yes	Affidavit of Cotenant Residency
60-AH	20	05/21	Prescribed	69.5(f)(1)	Yes	Yes	Claim of Person(s) at Least 55 Years of Age for Transfer of Base Year Value to Replacement Dwelling
60-NR	05	05/21	Prescribed	69.5(i)	Yes	Yes	Notice of Rescission of Claim to Transfer Base Year Value to Replacement Dwelling
62	15	05/16	Prescribed	69.5(f)(1)	Yes	Yes	Disabled Persons Claim for Transfer of Base Year Value to Replacement Dwelling
62-A	05	05/20	Prescribed	69.5(f)(1)(B)(i); 74.3(f)(1)	Yes	Yes	Certificate of Disability
62-LRDP	01	05/19	Prescribed	62(p)	No	Yes	Claim for Reassessment Reversal for Local Registered Domestic Partners
62-R	01	05/20	Prescribed	62(r)	No	Yes	Reassessment Exclusion for Transfer of Corporation Stock from Parent to Child
63	05	05/20	Prescribed	74.3	Yes	Yes	Disabled Persons Claim for Exclusion of New Construction for Occupied Dwelling
63-A	04	05/18	Prescribed	74.6(g)	No	Yes	Claim for Disabled Accessibility Construction Exclusion from Assessment for ADA Compliance
64	11	05/21	Prescribed	74.5(d)	No	Yes	Claim for Seismic Safety Construction Exclusion from Assessment

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64-RWC	00	12/18	Recommended	70(a)	No	Yes	Initial Purchaser Claim for Rain Water Capture System New Construction Exclusion
64-SES	03	09/14	Prescribed	73(e)(2)	No	Yes	Initial Purchaser Claim for Solar Energy System New Construction Exclusion
65-CP	03	05/19	Prescribed	69.4(f)(3)	No	Yes	Claim for Transfer of Base Year Value from Qualified Contaminated Property to Replacement Property
65-P	06	11/23	Prescribed	69	No	Yes	Claim for Intracounty Transfer of Base Year Value to Replacement Property for Property Damaged or Destroyed in a Governor-Declared Disaster
65-PT	06	01/12	Prescribed	69.3(e)	No	Yes	Claim for Intercounty Transfer of Base Year Value to Replacement Property from Principal Residence Damaged or Destroyed in a Governor-Declared Disaster
66-A	03	05/15	Recommended	534(d)(1)	No	Yes	Notice of Enrollment of Escape Assessment [Counties without Section 1605(c) provisions]
66-B	03	05/15	Recommended	534(d)(1)	No	Yes	Notice of Enrollment of Escape Assessment [Counties with Section 1605(c) provisions]
67-A	07	05/23	Recommended	75.31(g)	No	Yes	Notice of Supplemental Assessment [Counties without Section 1605(c) provisions]
67-B	05	05/19	Recommended	75.31(g)	No	Yes	Notice of Supplemental Assessment [Counties with Section 1605(c) provisions]
68	06	05/21	Prescribed	68 Rule 462.500	No	Yes	Claim for Base Year Value Transfer—Acquisition by Public Entity
121	02	01/10	Prescribed	672	No	Yes	Statement of Financial Interest
231-AH	28	05/23	Prescribed	254	No	Yes	Welfare Exemption/Section 231 Change in Eligibility or Termination Notice
236	07	05/19	Prescribed	254	No	Yes	Exemption of Leased Property Used Exclusively for Low-Income Housing
236-A	11	05/19	Prescribed	254	No	Yes	Supplemental Affidavit for BOE-236, Housing—Lower-Income Households
237	04	05/18	Prescribed	254	No	Yes	Exemption of Low-Income Tribal Housing
237-A	03	06/12	Prescribed	254	No	Yes	Supplemental Affidavit for BOE-237 Housing—Lower-Income Households
260	09	06/11	Prescribed	217	No	Yes	Certificate and Affidavit for Exemption of Work of Art
260-A	10	05/22	Prescribed	254	No	Yes	Certificate and Affidavit for Exemption of Certain Aircraft
260-B	15	05/22	Prescribed	254	No	Yes	Claim for Exemption from Property Taxes of Aircraft of Historical Significance
261	09	08/06	Prescribed	252	No	Yes	Claim for Veterans' Property Tax Exemption
261-D	02	08/10	Prescribed	571(d) Act	Yes	Yes	Servicemembers Civil Relief Act Declaration

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261-G	33	05/23	Prescribed	205.6; 251	Yes	Yes	Claim for Disabled Veterans' Property Tax Exemption
261-GNT	32	05/23	Prescribed	205.6; 251	Yes	Yes	Disabled Veterans' Exemption Change of Eligibility Report
262-AH	11	05/22	Prescribed	254	No	Yes	Church Exemption Claim
263	13	05/22	Prescribed	254	No	Yes	Lessors' Exemption Claim
263-A	07	06/17	Prescribed	254	No	Yes	Qualified Lessors' Exemption Claim
263-B	04	05/22	Prescribed	254	No	Yes	Lessees' Exemption Claim
263-C	03	05/22	Prescribed	254	No	Yes	Church Lessors' Exemption Claim
264-AH	13	05/22	Prescribed	254	No	Yes	College Exemption Claim
265	13	05/22	Prescribed	254	No	Yes	Cemetery Exemption Claim
265-NT	19	05/23	Prescribed	254	No	Yes	Cemetery Exemption Change in Eligibility or Termination Notice
266	13	05/20	Prescribed	251; 253.5	Yes	Yes	Claim for Homeowners' Property Tax Exemption (English and Spanish)
266-E	01	06/11	Prescribed	480.1	No	Yes	Ownership Statement, Cooperative Housing Corporation
266-Media	04	03/10	Recommended	218.5	Yes	Yes	Media Transmittal for Homeowners' Exemption Claim Records
267	15	05/21	Prescribed	254	No	Yes	Claim for Welfare Exemption (First Filing)
267-A	23	05/22	Prescribed	254	No	Yes	Claim for Welfare Exemption (Annual Filing)
267-F	01	05/20	Recommended	254	No	Yes	Assessor's Finding on Qualification of Property Use, Welfare or Veterans' Organization Exemption
267-FIR	02	03/08	Recommended	254	No	Yes	Welfare Exemption Assessor's Field Inspection Report
267-H	10	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Housing—Elderly or Handicapped Families
267-H-A	01	06/11	Prescribed	254	No	Yes	Elderly or Handicapped Families, Family Household Income Reporting Worksheet
267-L	21	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Housing—Lower-Income Households
267-L1	16	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Low-Income Housing Property of Limited Partnership
267-L2	03	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Housing – Lower Income Households – Tenant Data

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267-L3	03	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Households Exceeding Low-Income Limits – "Over-Income" Tenant Data (140% AMI)
267-L-A	03	05/18	Recommended	214(g)	No	Yes	Lower Income Households, Family Household Income Reporting Worksheet
267-O	01	06/17	Recommended	254	No	Yes	Welfare Exemption Supplemental Affidavit, Organizations and Persons Using Claimant's Real Property
267-R	09	05/21	Prescribed	254	No	Yes	Welfare Exemption Supplemental Affidavit, Rehabilitation—Living Quarters
267-S	11	05/12	Prescribed	254	No	Yes	Religious Exemption
267-SNT	27	05/23	Prescribed	254	No	Yes	Religious Exemption Change in Eligibility or Termination Notice
268-A	09	05/22	Prescribed	254	No	Yes	Public School Exemption
268-B	11	05/22	Prescribed	254	No	Yes	Free Public Library or Free Museum Claim
269-AH	11	05/22	Prescribed	254	No	Yes	Claim for Veterans' Organization Exemption
269-FIR	02	03/08	Recommended	254	No	Yes	Veterans' Organization Exemption Assessor's Field Inspection Report
270-AH	05	08/10	Prescribed	254	No	Yes	Exhibition Exemption Claim from Property Taxes
277	05	02/11	Prescribed	254	No	No-BOE Only	Claim for Organizational Clearance Certificate—Welfare Exemption
277-F	04	06/17	Prescribed	254	No	No-BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate Finding Sheet
277-F1	03	03/16	Prescribed	254	No	No-BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate—Preliminary Notice
277-F2	05	12/21	Prescribed	254	No	No-BOE Only	Welfare or Veterans' Organization Exemption Organizational Clearance Certificate—Final Notice
277-L1	07	01/22	Prescribed	254	No	No-BOE Only	Supplemental Clearance Certificate for Limited Partnership, Low-Income Housing Property—Welfare Exemption
277-LLC	02	02/11	Prescribed	254	No	No-BOE Only	Claim for Organizational Clearance Certificate, Welfare Exemption—Limited Liability Company
277-OC	--	10/03	Prescribed	254	No	No-BOE Only	Organizational Clearance Certificate for Welfare or Veterans' Organization Exemption
277-SF	04	08/16	Prescribed	254	No	No-BOE Only	Supplemental Clearance Certificate Finding Sheet for Limited Partnership Low-Income Housing Property, Welfare Exemption
277-SF1	04	08/16	Prescribed	254	No	No-BOE Only	Supplemental Clearance Certificate—Preliminary Notice for Limited Partnership Low-Income Housing Property, Welfare Exemption
277-SF2	04	08/16	Prescribed	254	No	No-BOE Only	Supplemental Clearance Certificate—Final Notice for Limited Partnership Low-Income Housing Property, Welfare Exemption
279	04	02/11	Prescribed	254	No	No-BOE Only	Claim for Organizational Clearance Certificate—Veterans' Organization Exemption

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305-A	02	08/09	Prescribed	1603(d)(1)	No	Yes	Informal Assessment Review
305-AH	11	05/22	Prescribed	1603(a)	No	Yes	Assessment Appeal Application
441d	02	05/23	Prescribed	441(d)	No	Yes	Request for Information
502-A	18	05/23	Prescribed	480.4(b)	Yes	Yes	Preliminary Change of Ownership Report
502-AH	21	05/23	Prescribed	480(c)	Yes	Yes	Change of Ownership Statement
502-D	14	05/23	Prescribed	480(c)	Yes	Yes	Change in Ownership Statement, Death of Real Property Owner
502-G	06	05/16	Prescribed	480(c)	Yes	Yes	Change in Ownership Statement, Oil and Gas Property
502-P	03	05/16	Prescribed	480.6	No	Yes	Possessory Interests Annual Usage Report
521-B	01	09/98	Prescribed	452(a)	Yes	Yes	Tree and Vine Record
540-S	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Mutual or Private Water Company Property Statement
560-A	05	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Aggregate Production Report
560-B	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Mining Production Report
560-C	07	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Mining Claim Production Report
566-D	08 09	08/10 05/14	Prescribed	452(a); 441(a)	Yes	Yes	Oil and Dissolved Gas Production Report
566-F	07	02/11	Prescribed	452(a); 441(a)	Yes	Yes	Dry Gas Production, Equipment, New Well, Redrill and Rework Report
566-J	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Oil, Gas and Geothermal Personal Property Statement
566-K	09	05/15	Prescribed	452(a); 441(a)	Yes	Yes	Annual Oil and Gas Operating Expense Data
567-D	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Geothermal Production Report
567-K	07	08/07	Prescribed	452(a); 441(a)	Yes	Yes	Annual Geothermal Operating Expense Data
570-1	00	11/19	Prescribed	441, 1152, 1153.5, 1157	Yes	Yes	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report
570-2	00	11/19	Prescribed	441, 1152, 1153.5, 1157	Yes	Yes	Supplementary Schedule to the Business Property Statement, Flight Equipment Value Computation

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570-3	03	08/04	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Air Carrier's Operation Report (Aircraft Value Computations)
570-3CF	01	08/07	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Air Carrier's Operation Report—Converted Freight
570-FO-1	02	01/08	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Supplementary Schedule to the Business Property Statement—Aircraft Cost Report
570-FO-2	02	01/08	Prescribed	452(a); 441(a); Rule 202(e)	Yes	Yes	Supplementary Schedule to the Business Property Statement—Aircraft Value Computation
571-A	27	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Agricultural Property Statement
571-C	26	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Power Plant Property Statement
571-D	25	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Supplementary Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported Scheduled B of the Business Property Statement
571-F	27	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Agricultural Property Statement
571-F2	04	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Registered and Show Horses Other Than Racehorses
571-J	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Annual Racehorse Tax Return
571-J1	04	08/03	Prescribed	452(a); 441(a)	Yes	Yes	Report of Boarded Racehorses
571-K	07	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Horse Property Statement (Other than Racehorses)
571-L	29	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Business Property Statement (Long Form)
571-LA	27	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Alternate Schedule A for Bank, Insurance Company, or Financial Corporation Fixtures
571-M	06	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Miscellaneous Property Statement
571-P	08	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Pipeline Property Statement
571-R	26	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Apartment House Property Statement
571-RW	05	08/06	Prescribed	452(a); 441(a)	Yes	Yes	Right-of-Way Property Statement
571-S	27	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Business Property Statement (Short Form)
571-STR	00	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Short Term Rental Property Statement For 2024
571-W	09	05/23	Prescribed	452(a); 441(a)	Yes	Yes	Wind Generation Property Statement

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572-A	02	09/10	Prescribed	480.7	Yes	Yes	Insurance Company Statement of Transfer
576-D	18	05/20	Prescribed	452(a); 441(a)	Yes	Yes	Vessel Property Statement
576-E	09	05/21	Prescribed	254	No	Yes	Affidavit for 4 Percent Assessment of Certain Vessels
577	07	05/18	Prescribed	452(a); 441(a); 5365	Yes	Yes	Aircraft Property Statement
577-A	02	08/09	Prescribed	5368	No	Yes	Airport Operations Report
674-A	01	10/22	Recommended	677, 678	No	No	Application for Interim/Temporary Assessment Analyst Certificate
675-B	01	10/22	Recommended	677,678	No	No	Application for Advanced Assessment Analyst Certification
740-A	09	10/22	Recommended	670	No	No	Application for Temporary Appraiser Certificate
740-B	03	10/22	Recommended	670	No	No	Application for Auditor-Appraiser Designation Following Appraiser Certification
743-A	08	10/22	Recommended	670	No	No	Report of Appraiser or Assessment Analyst Change in Employment Status
744-A	11	10/22	Recommended	670	No	No	Request for Training Hours
745-A	06	10/22	Recommended	670	No	No	Request for Course Approval
746-A	07	10/22	Recommended	670	No	No	Course Registration
746-B	01	10/22	Recommended	670	No	No	Sacramento State Basic Appraisal Online Course Registration
747-BC	08	10/22	Recommended	670	No	No	Application for Advanced Appraiser Certification
747-CC	02	10/22	Recommended	670	No	No	Application for Advanced Appraiser Certification: Supplemental Schedule for Non-BOE Courses
901-V	01	08/09	Prescribed	994	No	Yes	Application for Deduction of Vehicles' License Fees from Property Tax
902	00	01/15	Recommended	23181	No	Yes	Claim for Bank or Financial Corporation Exemption