



# TRANSFER FEE DISCLOSURE STATEMENT

On the Sale of One-to-Four Residential Units

Prepared by: Agent \_\_\_\_\_  
Broker \_\_\_\_\_

Phone \_\_\_\_\_  
Email \_\_\_\_\_

DATE: \_\_\_\_\_, 20\_\_\_\_\_, at \_\_\_\_\_, California.

Items left blank or unchecked are not applicable.

### FACTS:

1. This is an addendum to the following agreement:

- Purchase Agreement                       Escrow Instructions
- Counteroffer                                 Exchange Agreement
- \_\_\_\_\_

- 1.1  of same date, or dated \_\_\_\_\_, 20\_\_\_\_\_, at \_\_\_\_\_, California,
- 1.2 entered into by \_\_\_\_\_ and \_\_\_\_\_,
- 1.3 regarding real estate referred to as \_\_\_\_\_.

### NOTICE:

2. The above referenced property is subject to a requirement calling for the payment of a fee on the sale or other transfer of an interest in the property in addition to any fees set out in Section 3 below.

- 2.1 The amount of the transfer fee based on Seller's asking price for the property is \$\_\_\_\_\_.
- a. The fee is  a fixed or flat fee, or  calculated as \_\_\_\_\_% of the price paid for the property.
- 2.1 The actual amount of the transfer fee will vary if the fee is based on a percentage of the price paid for the property and that price is different from Seller's asking price.
- 2.3 The transfer fee is to be paid to \_\_\_\_\_.
- 2.4 The purpose for which the transfer fee will be used is \_\_\_\_\_.
- 2.5 The obligation to pay this transfer fee expires on  \_\_\_\_\_, 20\_\_\_\_\_, or  on the occurrence of \_\_\_\_\_.

3. A transfer fee does not include any of the following fees which may also become payable on the sale or transfer triggering the transfer fee disclosed in Section 1 above.

- 3.1 Government imposed fees and taxes due to the transfer.
- 3.2 Fees due on a court ordered transfer.
- 3.3 Property settlement on separation or dissolution of marriage fees.
- 3.4 Fees on administration of an estate.
- 3.5 Fees imposed by lenders.
- 3.6 Fees imposed by Homeowners' Associations (HOAs) or other common interest developments (CIDs).
- 3.7 Fees for breach of contract to construct residential improvements.
- 3.8 Transfer fees called for in a document recorded prior to 2008 which is not the CC&Rs and discloses information set forth in Section 2 above.

**I declare the above information to be true and correct.**  
 Date: \_\_\_\_\_, 20\_\_\_\_\_  
 Seller's Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 Seller's Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_

**I have received a copy of this statement.**  
 Date: \_\_\_\_\_, 20\_\_\_\_\_  
 Buyer's Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_  
 Buyer's Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_