

CARMEN CHU
ASSESSOR-RECORDER

SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER



Form 571L-R-STR

Business Property Statement

Manual

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Overview for Filing a Business Property Statement

I

I. OVERVIEW FOR FILING A BUSINESS PROPERTY STATEMENT

Purpose

This user-friendly reference guide provides an overview of the statutory requirements, answers to frequently asked questions (FAQs), and step-by-step instructions for filing a business property statement. The guide is divided into eight sections – (I) Overview for Filing a Business Property Statement, (II) Filing a Form 571-L Electronically (e-File), (II-B) Business Moved/Closed/Sold, (III) Filing a Form 571-L Paper Document, (IV) Filing through the Standard Data Record (SDR) System, (V) Filing a Form 571-STR Paper Document, (VI) General Business Personal Property Frequently Asked Questions (FAQs), (VI-A) E-File FAQ, (VI-B) Short-Term Rental FAQ, (VII) Contact Information, and (VIII) Appendix with samples of common forms related to the 571-L filing process.

Why are you taxing my business assets?

The State Constitution says all property is subject to property tax unless otherwise exempt. Homeowners are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation.

What is Business Personal Property?

Business Property is any tangible property owned, claimed, used, possessed, managed or controlled in the conduct of a trade or business. This includes all machinery, fixtures, office furniture and equipment. In general, business personal property is all property owned or leased by a business except licensed vehicles, business inventory, intangible assets, and application software.

Examples of business property that would be assessed as personal property include but are not limited to:

- Operating Supplies
- Machinery & Equipment
- Office Furniture
- Copiers and Fax Machines
- Telephones
- Computers
- Restaurant Equipment
- Cameras
- Printing Equipment
- Leasehold Fixtures
- Leasehold Structures (Tenant Improvement)

In essence, Business Personal Property is all property used in the course of doing business that is not exempt.

What personal property is exempt?

Personal Property is and can be exempt by reason of its ownership, use and/or type.

Types of property that are exempt:

- Business Inventories held for sale or lease
- DMV licensed vehicles
- Application software (Word, Excel, PowerPoint, etc.)
- Fire suppression systems
- Solar panels

Equipment owned by banks and financial institutions and insurance companies are exempt by **ownership**, while churches, public libraries and schools are exempt by **use**.

Who is required to file the Form 571-L?

Per Revenue and Taxation Code, Section 441, you must file a statement if:

- a) The Assessor's Office has sent you a Notice of Requirement to File 2018 Form 571-L Business Property Statement, OR
- b) You have taxable business property with a total cost of \$100,000 or more, located in the City and County as of January 1st of each year, even if the Assessor's Office did not send you a notice or otherwise request you to file a Business Property Statement; OR
- c) If you have not filed a Form 571-L in past years because you were on Direct Billing (assessed based on existing information in our records), you will receive a Notice of Requirement to File 2018 Form 571-L Business Property Statement this year because State Law requires a periodic update of Direct Bill accounts. Please file a Form 571-L to reaffirm your business' assessed value has stayed the same or to reflect changes that have taken place resulting in increases or decreases in value of your business property.

Failure to complete and return the property statement will result in the Assessor's Office estimating the value of your business property and adding a 10% penalty to the assessment (R&T Code Sections 441, 463 and 501). Additionally, upon discovery, we are required by law to go back four years and impose the tax on your business, plus penalties and interest (R&T Code Sections 506, 531, and 531.3).

We encourage you to e-File (electronic filing) using your Account Number and Personal Identification Number (PIN) which are pre-printed on the top right of your Notice of Requirement to File 2018 Form 571-L Business Property Statement. If you prefer to file your Business Property Statement by mailing it in, you must download and print a hard copy using your business Account Number and PIN. Both the e- Filing and mail in options can be accessed from our website (www.sfassessor.org/efile). For more information, please refer to Part II - Filing a Form 571-L Electronically (e-File).

What is the “lien date”?

The lien date is January 1st 12:01 a.m. every year. All personal property costs are to be reported or declared as of that date. Since the lien date is 12:01 a.m., you will report all personal property in your possession as of December 31st of the previous calendar year. For example, if the lien date is January 1st, 2018, then you would report all personal property in your possession as of December 31st, 2017.

Why am I getting a Notice of Requirement to File 2018 Form 571-L, I am no longer in business?

Even though you are no longer in business or have moved out of this location as of lien date January 1st, you received a Notice of Requirement to File 2018 Form 571-L and you are required by law to respond.

When are the filing deadlines?

All property statements are due April 1st annually. As April 1st falls on Sunday this year, the filing due date will be the following Monday, April 2nd. The last day to file the statements without penalty for this year is May 7th. When mailed through the post office, the forms are required to be postmarked by May 7th. For your protection, it is helpful to get a postage paid receipt for the statements mailed on the deadline day or close to that day. This will help eliminate the possibility of receiving a late filing penalty, because you will have proof of the date it was mailed. For statements filed electronically, the May 7th deadline also applies.

What if I file after May 7th?

May 7th is the last day to file without incurring a penalty. Section 463 of the Revenue and Taxation Code states “that any person who is required by law or is requested by the assessor to make an annual property statement fails to file the business property statement within the time specified, will be subject to a penalty of **10% of the assessed value of the property.**”

What if I do not file at all?

The penalty for not filing the business property statement is also 10% of the assessed value. However, the assessor is also allowed by law to estimate the value of the property based on the information in his possession. This generally is based on the prior year's filing or a site inspection of the business at the physical location.

What information is needed?

The most useful item to aid in completing the Form 571-L is an accurate and up to date asset listing. This list should include:

- The date of acquisition of the equipment
- The total cost (purchase price plus sales tax, freight and installation charges)
- Location of the equipment if you have multiple locations
- Disposal dates of equipment removed

Other records that could be helpful in completing the Form 571-L are the California State Tax Depreciation Schedule-form 4562, General Ledger, Balance Sheet and Income Statement. Some business owners may have purchased an existing business. The information needed in this situation would be the purchase agreement or the escrow papers that would show the breakdown of the equipment, fixtures and leasehold improvement acquired through the purchase of the business.

Confidentiality

The Form 571-L is not a public document. Therefore, the information declared on the Form will be held confidential by the assessor.



Filing a Form 571-L Electronically (e-File)

II

II. FILING A FORM 571-L ELECTRONICALLY (E-FILE)

The Assessor's Office is no longer mailing paper copies of the Form 571-L and attachments. Instead we are simplifying the process by providing you with an option to file directly online.

There are many benefits of e-Filing:

- E-File is a free online application that allows businesses to quickly and securely file the 2018 Form 571-L via the internet.
- No new software is needed to e-File.
- Businesses are allowed to save the statement in progress and complete it at a later time.
- E-Filing allows businesses to receive an immediate online confirmation once a statement is submitted. If you do not see the confirmation number after submitting, it means that your e-File statement is incomplete and did not go through. Please go back and resubmit it.
- Once a business has e-Filed, the Form 571-L statements are stored online, allowing businesses the ability to retrieve, view and print prior year e-Filed statements.

We mailed out several types of Notices, along with the assigned Account Number and Online PIN. By using the Account Number and PIN provided, you can meet your filing requirements by submitting a completed statement online or by downloading, printing, and returning a completed statement to our office. We strongly encourage you to file your Form 571-L electronically using e-File system.

The online portal (www.sfassessor.org/efile) will begin accepting online statements beginning **Tuesday, February 20th, 2018**. When logging in, enter the Account Number and PIN. The Account Number and PIN are unique to your business and provides secure access to your statement, guards your confidential information and protects your privacy. Please remember that the PIN is case sensitive.

The PIN is only good for this year, 2018, and is non-transferable. If you have multiple business locations, but only received notices to file in some of the locations, please email our office at askbpp@sfgov.org for assignment of additional Account Number and PIN.

To retrieve your PIN, please go to the San Francisco County Assessor's e-Filing website, www.sfassessor.org/efile, and click on "FILE 2018 STATEMENT." Click "Forgot My Pin" at the bottom of Logon page. Enter your nine-digit account number without dashes, the five-digit mailing address zip code and four-digit year for when your business opened.

You may also send a written request, on company's letterhead with an authorized signature. Include the Account number, ownership name, DBA, mailing address, and location of the property, to the Business Personal Property Division by fax (415) 554-5544, or e-mail as an attachment to askbpp@sfgov.org. Please note that once we receive this request, the Assessor's

Office will only mail the PIN to the address that we have in our records. If you want us to mail it to a different address, please indicate it on your written request. If you are an agent of a taxpayer, an authorization letter from the business owner is required.

For more information, please refer to the e-File Frequently Asked Questions (FAQs) section of this Manual. If you still have additional questions, please contact the Business Personal Property Division by sending an email to askbpp@sfgov.org.

Your 2018 Business Property Statement is due by April 2nd, 2018. The last day to e-File without incurring a penalty is May 7th, 2018. The late filing penalty is 10% of the total assessed value.

II (A). E-FILE USER'S GUIDE (INSTRUCTIONS FOR ELECTRONIC FILING)

This is a comprehensive user's guide on how to electronically file (e-File) the Form 571-L Business Property Statement. It includes a step-by-step instruction with sample screens. Although the actual screen will show information relating to your business, some data on the sample screens were blocked to maintain the confidentiality of certain businesses.

There are many benefits of e-Filing:

- E-File is a free online application that allows businesses to quickly and securely file the 2018 Form 571-L via the internet.
- No new software is needed to e-File.
- Businesses are allowed to save the statement in progress and complete it at a later time.
- E-Filing allows businesses to receive an immediate online confirmation once a statement is submitted. If you do not see the confirmation number after submitting, it means that your e-File statement is incomplete and did not go through. Please go back and resubmit it.
- Once a business has e-Filed, the Form 571-L statements are stored online, allowing businesses the ability to retrieve, view and print prior year e-Filed statements.

In February 2018, you received one of the following four Notices: (1) *Notice of Requirement to File 2018 Form 571-L Business Property Statement*, (2) *Notice to e-File 2018 Form 571-L Business Property Statement*, (3) *Direct Bill Notice*, or (4) *Low Value Exemption Notice*. You will use the Account Number and PIN printed on the Notice to access your business account online.

The minimum system requirements are as follows:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, Mobile Devices are **NOT** supported at this time.


Some captured screens in this manual are for 2017, but no changes have been made to those screens for the Lien Year 2018.

- I. **FILE 2018 STATEMENT** - Go to the San Francisco County Assessor's e-Filing website, <http://www.sfassessor.org/efile>, and click on "[FILE 2018 STATEMENT](#)" (Fig. 1).

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Business Property Statement - 2018



Welcome to the County Assessor's e-File System!

Current Statement	Prior Statement
FILE 2018 STATEMENT	VIEW STATEMENT

IMPORTANT DATES TO REMEMBER :

- April 2 - Due Date for Form 571-L Business Property Statement.
- May 7 - Last Day to File
Any statements postmarked after May 7 will have a 10% penalty assessed in accordance with Section 441(b) of the California Revenue and Taxation Code.
- May 31 - Last Day to Use E-Filing System. Thereafter, this site will become unavailable for filing statements and you must file hardcopy. However, all statements filed electronically may still be viewed after this date.

IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Note: Apple Safari, Google Chrome, or Mobile Devices are NOT supported at this time.
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Fig. 1

- II. **LOG ON** - Enter the Account Number and PIN provided on the Notice, and Business Account Number (BAN) (Optional), and then click "Submit." Do not use dashes or spaces when entering the Account Number. Note that the PIN is case sensitive. BAN is seven digit number issued by the Office of the Treasurer & Tax Collector (Fig. 2)

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Business Property Statement - 2018



Logon

Please enter the nine-digit account number as it appears on the relevant notice you received:
Then enter the PIN, which is case-sensitive. For assistance, click "Help."

For Electronic Filing businesses, prior to submitting your filing, you may review and/or print a copy of your Form 571-L Business Property Statement. After filing, a confirmation number, date, and time will be provided for your records.

For Electronic Filing businesses, you do not have to complete your filing at one time. You may save your data at any time by clicking "Save". After logging in, if you feel additional information is necessary, please click and enter using the "Remarks" link at the top of any page.

Account #: * (Do not enter dashes or spaces.)

PIN: * (PIN is case sensitive.)

Business Account # (BAN): (Optional) (Refer to your Business Registration Certificate issued annually by the San Francisco Treasurer & Tax Collector's Office; enter the full 7-digit number) ?

[Submit](#) [Clear Page](#) [Forgot My Pin](#)

If you would like to receive future notices from our office in a language other than English, please complete and submit [this online request form](#). You can access translations of this year's notices by clicking here.

We are also gathering additional contact information to better communicate with you. Your information is strictly for office use only; the information will not be sold or distributed to a third party for any purpose. Participation is voluntary.

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Fig. 2

FORGOT MY PIN - To retrieve your PIN, please click “Forgot My Pin” on Logon page (Fig. 2). Enter your nine-digit account number without dashes, the five digit mailing address zip code and four-digit year for when your business opened (Fig. 2.1).



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571-L Business Property Statement - 2017

Forgot My PIN

To retrieve your PIN, please enter your nine-digit account number without dashes, the five-digit mailing address zip code, and the four-digit year for when your business opened.

Account Number: *	<input type="text"/>	(No spaces or dashes)
Mailing Address Zip Code: *	<input type="text"/>	
Year your business opened: *	<input type="text"/>	(YYYY)

[Return To Login](#) | [Clear Form](#) | [Retrieve My PIN](#)

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Fig. 2.1


- III. **ELECTRONIC FILING** - Click “Electronic Filing (E-File Directly Online)” to start the e-File process (Fig 3). If you have previously used the e-Filing process, you will be directed to the “Questionnaire” screen (Fig. 4).

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Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2017

Company Number:



Welcome

Electronic Filing (E-File Directly Online)

Accessible: You can access your current and previous years filed statements anytime and anywhere there is an internet connection.

Accurate: Less mistakes in processing the return, because data is loaded electronically.

Convenient: The ability to file 24 hours a day 7 days a week. You may save your data anytime and complete your e-Filing later.

Efficient: Faster than mailing, save on postage and minimize usage of paper.

Reliable: A confirmation certification indicating the date and time of filing is issued after your return is submitted.

Green: Let's go green together. Use technology not paper.

Confidential: Only the owner of the Account Number and PIN can view Form 571-L statement, and it is not a public document.

If you do not have an email address or would like to file by mail, you may do so by [clicking here](#). Businesses that choose to file by mail must download their statement from this system and print, complete, and mail the Form 571-L statement to our office. If you have any questions, please call (415) 554-5331 or email askbpp@sfgov.org.

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Fig. 3



Questionnaire

Please select any of the boxes below that apply to you, then click the 'Submit' button. If none of the boxes apply to you, simply click the 'Submit' button to continue.

If you check any of the boxes on this page, and click the 'Submit' button, you will not be able to use our e-file system to file your Form 571-L. At this time, we are not able to accept electronic submissions for filers in any of the categories listed below, including filers that have no email address.

Note: We value your privacy and confidentiality. All of the information you provide us is **confidential**, including your email address. We do not share, sell, or in any way distribute your email address to any outside parties.

If you have any questions you may call (415) 554-5531 or send email to askbpp@sfgov.org.

- ☐ I own a residential property, such as an apartment house, and I rent it out as a business.
If your business is an apartment (or short-term rental), please contact our office to obtain Form 571-R (or 571-STR) by calling 415-554-5531 or email askbpp@sfgov.org.
- ☐ I have equipment out on lease to others.
- ☐ I am a bank or financial institution recognized by the State of California.
- ☐ I am an insurance company recognized by the State of California.
- ☐ I am a biotech company.
- ☐ I currently own or lease one or more billboards within San Francisco County.
- ☐ I do NOT have an email address. (You must have an email address to use our e-file system to file your 571-L.)

If the **LOCATION** of your business (printed on page 1 of the Notice you received) has **changed**, please select one of the choices below to indicate if it was **moved**, **closed**, or **sold**.

If only your **mailing address** changed, DO NOT select any of the choices below and continue to e-file. You will have an opportunity during the filing process to update your mailing address, and clicking one of the options below in error may result in duplicate accounts and assessments in our system.

- ☐ My business moved to another location **within** San Francisco County.
- ☐ My business moved to another location **outside** San Francisco County.
- ☐ My business closed.
- ☐ My business was sold.

[Submit](#) [Clear Page](#)

IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

Fig. 4

IV. QUESTIONNAIRE – Review if any of the boxes apply to your business. If any of the boxes apply, check the appropriate box and click “Submit” (Fig. 4). Unfortunately, if you check any of the boxes in the first section, you **cannot** use our e-File system. You need to download and print hard copies of the Form 571-L Business property Statement. Please refer to III (A) File by Mail User’s Guide (Download, Print, Complete, Sign & Mail). If none of the boxes apply to your business, click “Submit” to go to “Step 1 - Ownership Info.”

In the e-Filing process, there are five major steps: Step 1 - Ownership Info, Step 2 - General Info, Step 3 - Your Property, Step 4 - Other’s Property, and Step 5 - Certification. The highlighted tab indicates which step you are in. You can always go back to any step, if you need to make changes, by clicking the corresponding “**STEP**” tab, once required fields are completed. If you need to stop at any point, click “Save” and “Log Off” to exit the system.

STEP 1– Ownership Information (Fig. 5)

Review the preprinted information and make necessary corrections; however, you cannot edit the “Owner Name” or “Location of Property” fields. To make a minor correction to the “Location of Property” such as change of street type or spelling of street name, click “Remarks” at the bottom of the page or at the top of the page in the dark blue bar. Enter your changes in the “Remarks” pop-up window, then click “Save” in the same window, and then click to close the pop-up window. If your property location has changed, please contact askbpp@sfgov.org instead. You are required to update all the fields marked with a red asterisk (*) before you can go to the next step. Click “Save,” then click “Next” to go to the next screen – “Step 2 - General Info.” (Fig. 6)

CLOSED OR SOLD BUSINESS – If your business moved, or was closed or sold, refer to II (B) – Business Moved/Closed/Sold.

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Step 1
Ownership Info
Step 2
General Info
Step 3
Your Property
Step 4
Others' Property
Step 5
Certification

Log Off
Remarks
571-L Instructions
Help

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Company Number: XXXXXXXXXX | [View Form](#)

Ownership Information

[Save](#) [Next](#)

Please review the information below and make all necessary corrections. All fields marked with an asterisk (*****) are required. Click "save" if you updated any field. Click "next" to save and proceed.

Name (NOTE: If owned by a sole owner or partnership, the format should be last name first.)	
Owner Name 1: XXXXXXXXXX	DBA: XXXXXXXXXX
Owner Name 2: XXXXXXXXXX	C/O: XXXXXXXXXX
Email Address: * XXXXXXXXXX	

If you recently moved, please provide your new mailing address. Otherwise, please make any necessary corrections below.

Mailing Address	
Street Number: XXXX ?	Street Direction: --- Please Select --- ?
Street Name/P.O.: * XXXXXXXXXX ?	Street Type: XXXXXX
Suite/Room: XXXX	City: * XXXXXXXXXX
State: * XXXXXX	Zip: * XXXX XXXX
Country: * United States	

Location of Property	
Street Number: XXXX	Street Direction: XXXX
Street Name: XXXXXXXXXX	Street Type: XXXXXX
Suite/Room: 0200	

To make minor corrections to the location of property (i.e. street spelling, St. to Ave., etc.), please indicate the changes in the remarks area. If your property location has changed, please contact askbpp@sfgov.org.

[Save](#) [Next](#)

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Fig. 5

STEP 2 – General Information

Update all the fields marked with a red asterisk (*). These fields are required before you can go to the next step (Fig. 6). Click “Save,” then click “Next” to go to the next screen – “Step 3 - Your Property” (Fig. 7).

Step 1
Ownership Info

Step 2
General Info

Step 3
Your Property

Step 4
Others' Property

Step 5
Certification

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Company Number: View Form



General Information

[Previous](#) [Save](#) [Next](#)

Please answer the questions below. Once required fields have been completed, you may click "Next" or "Previous" to continue to the next/previous step. You may click "Save" to save your changes while remaining on this page. If you wish to return to Step 1 without saving your changes, simply click the "Step 1 Ownership Info" tab, at the top of this page.

All fields marked with an asterisk (*) are required.

a) Type of Business: *

(see the [SF Treasurer's website](#) for descriptions of business types.)

b) Local Telephone: () - Ext.# *

Local FAX: () -

c) Do you own the land at this business location? - Choose - ▾ *

If yes, is the name on your deed recorded as shown on this statement? - Choose - ▾

d) When did you start your business at this location? / / * (mm/dd/yyyy) ?

If your business name or location has changed from last year, enter the former name and location:
[View/Update Address](#)

e) Enter location of general ledger and all related accounting records (include zip code):
and

f) Enter the name and telephone number of authorized person to contact at location of accounting records:
[View/Update Address](#) *

g) During the period of January 1, 2016 through December 31, 2016:

- 1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" in this business entity? ([see instructions for definition](#))
 - Choose - ▾ *
- 2) If YES, did this business entity also own "real property" in California at the time of the acquisition? ([see instructions for definition](#))
 - Choose - ▾
- 3) If YES to both questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.

[Previous](#) [Save](#) [Next](#)

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Fig. 6

STEP 3 – Your Property

The main screen of Step 3 is the “**Declaration of Property Belonging to You.**” This screen shows major business property categories: Supplies, Equipment, Buildings/Improvements, and Construction in Progress (Fig. 7). The Equipment and Buildings/Improvements categories are linked to sub-categories and cost detail screen. You can change the cost for each sub-category and create a new sub-category (refer to applicable instructions in succeeding pages).

- **Supplies** – Enter the amount under “This Year’s Cost” (Fig. 7).
- **Equipment** – If you have any equipment to report, click “View/Update” in the Operation column. This will bring you to the “Schedule A: Equipment” screen (Fig. 8).
- **Buildings/Improvements** – If you have any leasehold improvement to report, click “View/Update” in the Operation column. This will bring you to the “Schedule B: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land and Land Development” screen (Fig. 12).
- **Construction in Progress** – If you have any construction in progress to report, click “View/Update” in the Operation column. This will bring you to the “Construction in Progress Cost Detail” screen (Fig. 19).

If you have nothing to report in this section, go to Step 4 - Other’s Property.

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Step 1 Ownership Info | Step 2 General Info | **Step 3 Your Property** | Step 4 Others' Property | Step 5 Certification

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Declaration of Property Belonging to You

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The categories below display the total costs you reported last year. If the cost of your supplies has changed, enter this year's cost and click "save". To change the reported cost for the other categories of property, click "View/Update".

NOTE: At this time, we are not able to accept electronic submissions for filers that have "Equipment out on Lease to Others".

NOTE: Enter numeric characters only. Omit commas and cents.

Category	Last Year's Cost	This Year's Cost	Operation
Supplies	9533	9533	
Schedule A: Equipment	157597	157597	View/Update
Schedule B: Buildings/Improvements	0	0	View/Update
Construction in Progress	0	0	View/Update

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Fig. 7

Schedule A: Equipment

Schedule A shows the following equipment sub-categories: Machinery and Equipment, Office Furniture and Equipment, Other Equipment, Tools, Personal Computers, and Local Area Network.

1. To change the cost for each sub-category, click “View/Update” under the “Operation” column. This will bring you to the “Schedule A Cost Detail” screen (refer to sample – Fig. 9).

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Schedule A: Equipment

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The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update." You may add commonly reported categories by selecting the category from the drop-down list and clicking "Create". For categories not listed, enter a category description and click "Create". This allows you to provide your description of the property.

Description	Last Year's Total	This Year's Total	Operation
MACHINERY & EQUIPMENT	0	0	View/Update
OFFICE FURN & EQUIP	37861	37861	View/Update
OTHER EQUIPMENT	0	0	View/Update
TOOLS	0	0	View/Update
PERSONAL COMPUTERS	119736	119736	View/Update
LOCAL AREA NETWORK (LAN) EQUIPMENT & MAINFRAMES	0	0	View/Update
Total	157597	157597	

Select New Category ▼

or Enter New Category:

Create

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Fig. 8


SAMPLE OF COST DETAIL

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Schedule A Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

OFFICE FURN & EQUIP

Year of Acq.	Last Year's Cost	This Year's Cost
2016	0	<input type="text" value="0"/>
2015	12236	<input type="text" value="12236"/>
2014	0	<input type="text" value="0"/>
2013	0	<input type="text" value="0"/>
2012	0	<input type="text" value="0"/>
2011	0	<input type="text" value="0"/>
2010	0	<input type="text" value="0"/>
2009	0	<input type="text" value="0"/>
2008	0	<input type="text" value="0"/>
2007	0	<input type="text" value="0"/>
2006	0	<input type="text" value="0"/>
2005	0	<input type="text" value="0"/>
2004	0	<input type="text" value="0"/>
2003	0	<input type="text" value="0"/>
2002	0	<input type="text" value="0"/>
2001	0	<input type="text" value="0"/>
2000	0	<input type="text" value="0"/>
1999	0	<input type="text" value="0"/>
1998	0	<input type="text" value="0"/>
1997	0	<input type="text" value="0"/>
1996	0	<input type="text" value="0"/>
1995	0	<input type="text" value="0"/>
Prior	0	<input type="text" value="0"/>
Total	12236	12236

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Fig. 9

2. To create a new category, click “Select New Category” from the drop down menu at the bottom, or enter a new category on the blank field (Fig. 10). Click “Create” to add the new sub-category and to create a new cost detail screen (refer to sample of new cost detail screen – Fig. 11).

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Step 3
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Step 4
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Schedule A: Equipment
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The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update." You may add commonly reported categories by selecting the category from the drop-down list and clicking "Create". For categories not listed, enter a category description and click "Create". This allows you to provide your description of the property.

Description	Last Year's Total	This Year's Total	Operation
MACHINERY & EQUIPMENT	0	0	View/Update
OFFICE FURN & EQUIP	37861	37861	View/Update
OTHER EQUIPMENT	0	0	View/Update
TOOLS	0	0	View/Update
PERSONAL COMPUTERS	119736	119736	View/Update
LOCAL AREA NETWORK (LAN) EQUIPMENT & MAINFRAMES	0	0	View/Update
Total	157597	157597	
<div><div>Select New Category ▼</div> or Enter New Category: <input type="text" value="MEDICAL HIGH TE"/> Create</div>			

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Fig. 10

SAMPLE OF NEW COST DETAIL

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Schedule A Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

OTHER: MEDICAL HIGH TECH

Year of Acq.	Last Year's Cost	This Year's Cost
2016	0	<input type="text" value="0"/>
2015	0	<input type="text" value="0"/>
2014	0	<input type="text" value="0"/>
2013	0	<input type="text" value="0"/>
2012	0	<input type="text" value="0"/>
2011	0	<input type="text" value="0"/>
2010	0	<input type="text" value="0"/>
2009	0	<input type="text" value="0"/>
2008	0	<input type="text" value="0"/>
2007	0	<input type="text" value="0"/>
2006	0	<input type="text" value="0"/>
2005	0	<input type="text" value="0"/>
2004	0	<input type="text" value="0"/>
2003	0	<input type="text" value="0"/>
2002	0	<input type="text" value="0"/>
2001	0	<input type="text" value="0"/>
2000	0	<input type="text" value="0"/>
1999	0	<input type="text" value="0"/>
1998	0	<input type="text" value="0"/>
1997	0	<input type="text" value="0"/>
1996	0	<input type="text" value="0"/>
1995	0	<input type="text" value="0"/>
Prior	0	<input type="text" value="0"/>
Total	0	0

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Fig. 11

Schedule B: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land and Land Development

Schedule B shows the following sub-categories: Leasehold Improvements (LHI) - Structural, LHI - Fixtures, Land Improvements, and Land & Land Development (Fig. 12).


1. To add, delete or change the cost for each category, click “View/Update” under the “Operation” column. This will bring you to “Schedule B Cost Detail” screen (refer to sample – Fig. 13 & Fig. 16). You will not be able to enter a negative number. Click “Save.”
2. Any net change needs to be reported on **Schedule D**. Click the number shown under “Unreported Change” column (Fig. 13). This will bring you to “Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B” (Fig. 14 & 17). Enter the following information: Type, Month and Year of Addition or Disposal, Cost, Description, and Year Acquired. Click “Create” then click “Next” (Fig. 15 & 18).
3. **Tenant Allowances** (Fig. 12) - If you received allowances for tenant improvements, select “Yes” and indicate the amount. If you need to provide additional information regarding tenant improvements, click “Remarks,” enter the information and click “Save.”

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 **Schedule B: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land and Land Development**

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The categories below summarize the totals you reported last year. You may change the cost for each category by clicking "View/Update". Also, please answer the question at the bottom of the page regarding any allowances received for tenant improvements.

Description	Last Year's Total	This Year's Total	Operation
LHI - STRUCTURAL	121631	121631	View/Update
LHI - FIXTURES	15430	15430	View/Update
LAND IMPROVEMENTS	0	0	View/Update
LAND & LAND DEVELOPMENT	450	450	View/Update
Total	127541	137511	

Have you received allowances for tenant improvements for the current reporting period that are not reported above? ☒ Yes ☐ No

If Yes, indicate amount: *

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Fig. 12

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Schedule B Cost Detail

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The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

If "This Year's Cost" is different than the "Last Year's Cost", then this difference will be calculated and displayed in the "Net Change" column. We request that this Net Change be accounted for in Schedule D. After saving your data, you may then account for each Net Change amount by clicking on the "Un-Reported Change" amount, which will then take you to the Schedule D page to account for this difference. The total Additions/Disposal amounts reported on Schedule D are also calculated and displayed on this page for each "Year of Acq". Please make every effort to account for the Net Change for each "Year of Acq", and report it in Schedule D.

Unreported Variance Detected

One or more rows reported below have a variance (Net Change) from Last Year's reported cost, which is not fully accounted for in Schedule D. Please make every effort to identify the cause for this variance and report it in Schedule D for each "Year of Acq". This can be done by clicking on the respective "Un-Reported Change" amount, which will allow you to account for the given Net Change for the specific "Year of Acq".

LHI - STRUCTURAL

Year of Acq.	Last Year's Cost	This Year's Cost	Net Change	Reported on Schedule D		
				Additions	Disposals	Unreported Change
2016	0	350000	350000			350000
2015	0	0				
2014	0	0				
2013	0	0				
2012	121631	121631				
2011	0	0				
2010	0	0				
2009	0	0				
2008	0	0				
2007	0	0				
2006	0	0				
2005	0	0				
2004	0	0				
2003	0	0				
2002	0	0				
2001	0	0				
2000	0	0				
1999	0	0				
1998	0	0				
1997	0	0				
1996	0	0				
1995	0	0				
Prior	0	0				
Total	121631	471631	350000	0	0	350000

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Fig. 13

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Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - STRUCTURAL](#) Acquired in [2016](#)

Report all acquisitions and disposals reported for [LHI - STRUCTURAL](#) Acquired in [2016](#) on Schedule B for the period January 1, 2016 through December 31, 2016, complete the information as required below and click "Create".

Additions: Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2016 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

Disposals: Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

IMPORTANT

Only one ROW can be edited at a time. Once you have made changes to any values in a row, click "Save" to save the changes to that row. If it is a new row you are creating, click "Create" to save the new row. Once you have completed your changes on this page, click "Next" to continue to the next screen.

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Additions/Disposals For Category: [LHI - STRUCTURAL](#) Acquired in [2016](#)

Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - STRUCTURAL	Addition ▼	Jan ▼	2016	350000	REMODEL RECEPTION AREA	2016	Create

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Fig. 14

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Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - STRUCTURAL](#) Acquired in [2016](#)

Report all acquisitions and disposals reported for [LHI - STRUCTURAL](#) Acquired in [2016](#) on Schedule B for the period January 1, 2016 through December 31, 2016, complete the information as required below and click "Create".

Additions: Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2016 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

Disposals: Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

IMPORTANT

Only one ROW can be edited at a time. Once you have made changes to any values in a row, click "Save" to save the changes to that row. If it is a new row you are creating, click "Create" to save the new row. Once you have completed your changes on this page, click "Next" to continue to the next screen.


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Additions/Disposals For Category: LHI - STRUCTURAL Acquired in 2016							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - STRUCTURAL	Disposal	May	2016			2016	Create
LHI - STRUCTURAL	Addition	Jan	2016	350000	REMODEL RECEPTION AREA	2016	Save Delete

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Fig. 15



Schedule B Cost Detail

[Save](#) [Back](#)

The costs you reported last year are listed. Make any necessary changes. To save your data at any time click "save". Clicking "back" will allow you to save your data and proceed back to the previous page.

If "This Year's Cost" is different than the "Last Year's Cost", then this difference will be calculated and displayed in the "Net Change" column. We request that this Net Change be accounted for in Schedule D. After saving your data, you may then account for each Net Change amount by clicking on the "Un-Reported Change" amount, which will then take you to the Schedule D page to account for this difference. The total Additions/Disposal amounts reported on Schedule D are also calculated and displayed on this page for each "Year of Acq". Please make every effort to account for the Net Change for each "Year of Acq", and report it in Schedule D.

LHI - FIXTURES						
Year of Acq.	Last Year's Cost	This Year's Cost	Net Change	Reported on Schedule D		
				Additions	Disposals	Unreported Change
2016	0	<input type="text" value="0"/>				
2015	0	<input type="text" value="0"/>				
2014	0	<input type="text" value="0"/>				
2013	0	<input type="text" value="0"/>				
2012	0	<input type="text" value="0"/>				
2011	15430	<input type="text" value="15430"/>				
2010	0	<input type="text" value="0"/>				
2009	0	<input type="text" value="0"/>				
2008	0	<input type="text" value="0"/>				
2007	0	<input type="text" value="0"/>				
2006	0	<input type="text" value="0"/>				
2005	0	<input type="text" value="0"/>				
2004	0	<input type="text" value="0"/>				
2003	0	<input type="text" value="0"/>				
2002	0	<input type="text" value="0"/>				
2001	0	<input type="text" value="0"/>				
2000	0	<input type="text" value="0"/>				
1999	0	<input type="text" value="0"/>				
1998	0	<input type="text" value="0"/>				
1997	0	<input type="text" value="0"/>				
1996	0	<input type="text" value="0"/>				
1995	0	<input type="text" value="0"/>				
Prior	0	<input type="text" value="0"/>				
Total	15430	15430	0	0	0	0

Fig. 16

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Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - FIXTURES](#) Acquired in [2016](#)

Report all acquisitions and disposals reported for [LHI - FIXTURES](#) Acquired in [2016](#) on Schedule B for the period January 1, 2016 through December 31, 2016, complete the information as required below and click "Create".

Additions: Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2016 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

Disposals: Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

IMPORTANT

Only one ROW can be edited at a time. Once you have made changes to any values in a row, click "Save" to save the changes to that row. If it is a new row you are creating, click "Create" to save the new row. Once you have completed your changes on this page, click "Next" to continue to the next screen.

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Additions/Disposals For Category: LHI - FIXTURES Acquired in 2016							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - FIXTURES	Addition ▼	Jan ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	2016	Create

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Fig. 17

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Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

For Category: [LHI - FIXTURES](#) Acquired in 2016

Report all acquisitions and disposals reported for [LHI - FIXTURES](#) Acquired in 2016 on Schedule B for the period January 1, 2016 through December 31, 2016, complete the information as required below and click "Create".

Additions: Describe and enter the total acquisition cost(s), including excise, sales and use taxes, freight-in, and installation charges, by month of acquisition; transfer-in should also be included. The former property address and date of transfer should be reported, as well as original date and cost(s) of acquisition.

Only completed projects should be reported here (e.g., the date the property becomes fully functional and/or operational, otherwise it should be reported as Construction-in-Progress in Step 3).

Identify completed construction that was reported as construction-in-progress on your 2016 property statement. Describe the item(s) and cost(s) as previously reported, in the [Remarks](#) section of the eFile application.

Disposals: Information on this property should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc) and name and addresses of purchasers when items are either sold or transferred.

IMPORTANT

Only one ROW can be edited at a time. Once you have made changes to any values in a row, click "Save" to save the changes to that row. If it is a new row you are creating, click "Create" to save the new row. Once you have completed your changes on this page, click "Next" to continue to the next screen.

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Additions/Disposals For Category: LHI - FIXTURES Acquired in 2016							
Category	Type	Month of A/D	Year of A/D	Cost	Description	Year Acquired	Operation
LHI - FIXTURES	Addition ▼	Jan ▼				2016	Create
LHI - FIXTURES	Disposal ▼	Aug ▼	2016	10000	REMOVE SHORT PARTITIONS	2016	Save Delete

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Fig. 18

Construction in Progress

Under “Construction in Progress Cost Detail” screen, fill out the following information: Year of Acquisition, Cost, and Description. Click “Save”, then click “Back” (Fig. 19).

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Construction in Progress Cost Detail

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Below is the detail information by year for your assets. You may update the cost value for a given year by changing the value. You may create a new year by entering the year and cost in the create section. Click save to update your changes.

Important: Please provide a detailed description. The Assessor's office must determine whether the construction is personal or real property. The detail will prevent any duplication of assessments.

Construction in Progress

Year of Acq.	Cost	Description
Create Section		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Save](#) [Back](#)


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Fig. 19

STEP 4 – Other’s Property

The main screen of Step 4 is the “**Declaration of Property Belonging to Others**” screen (Fig. 20); which shows three sub-categories: Leased Equipment, Vending Equipment, and Other Businesses. You can create, edit or delete a lessor, a vendor and/or other businesses.

If you have nothing to report for 2018 on Step 4 and you did not report any leased equipment, vending equipment and other business in 2017, proceed to Step 5 - Certification, by clicking on the tab of the page.




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 **Declaration of Property Belonging to Others** [Previous](#) [Next](#)

Click "View/Update/Create" next to the category you want to report.

Description	Operation
Leased Equipment	View/Update/Create
Vending Equipment	View/Update/Create
Other Businesses	View/Update/Create

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Fig. 20

❖ Leased Equipment

Click “View/Update” and/or “Create Lessor” as appropriate. This will bring you to the “Lessor” screen (Fig. 21). To return to the “Declaration of Property Belonging to Others” screen, click “Back.”

1. To edit or delete an existing lessor or lease information, click “View/Update” under the “Operation” column. This will bring you to the “Create/Update Lessor Data” screen. Add or make changes to the leased equipment information. To delete a leased equipment item, check the box under “Delete” column (Fig. 22). Click “Save,” then click “Back” to return to the “Lessor” screen.
2. To create a new lessor, click “Create Lessor” (Fig. 21). This will bring you to the “Create/Update Lessor Data” screen. Fill out the leased equipment information. Click “Save,” then click “Back” to return to the “Lessor” screen.

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Step 2
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Step 3
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Step 4
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Carmen Chu
Assessor-Recorder
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San Francisco, CA 94103
(415) 554-5531
askbpp@sfgov.org

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Lessor

To add a new lessor, click "Create Lessor." To edit an existing lessor or lease information click "View/Update." To delete a lessor and all associated leases, click "delete lessor."

[Create Lessor](#) [Back](#)

Lessor Name	Street	City	State, Zip	Operation
ABC CO	888 MARKET ST	SAN FRANCISCO	CA, 94111	View/Update Delete Lessor
XYZ LLC	100 STREET	SAN FRANCISCO	CA, 94100	View/Update Delete Lessor

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Fig. 21

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Create/Update Lessor Data

[Cancel](#) [Save](#) [Back](#)

Enter the data requested below regarding your lease.

Lessor Name and Mailing Address									
Lessor Name: *	<input type="text" value="ABC CO"/>								
Street Number:	<input type="text" value="888"/>	?	Street Direction:	<div>--- Please Select --- ?</div>					
Street Name or P.O. Box:	<input type="text" value="MARKET"/>	?	Street Type:	<div>STREET v</div>					
Suite/Room:	<input type="text"/>		City:	<input type="text" value="SAN FRANCISCO"/>					
State:	<div>California v</div>		Zip:	<input type="text" value="94111"/> <input type="text"/>					
Country:	<div>United States v</div>								

Tax Obligation	Type Code ?	Year of Acq.	Year of Mfr. ?	Lease ID	Description	Cost To Purchase New ?	Annual Rent	Delete
Update Section								
Lessor v	Leased Equi v	2015	U	12345	COPIER	U	5000	<input type="checkbox"/>
Create Section								
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Lessor v	Leased Equi v	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

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Fig. 22


- ❖ **Vending Equipment** - Follow the same steps as described in the Leased Equipment section (Page 31) of this document to update this section (Fig. 23 to 24).

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Vendor

To add a new vendor, click "Create Vendor." To edit an existing vendor or vending information click "View/Update." To delete a vendor, click "Delete Vendor."

[Create Vendor](#) [Back](#)

Vendor Name	Street	City	State, Zip	Operation
AABB COMPANY	1111 STREET ST	SAN FRANCISCO	CA, 94111	View/Update Delete Vendor
XYZ LLC	100 AVENUE ST	SAN FRANCISCO	CA, 94112	View/Update Delete Vendor

Create Vendor
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Fig. 23

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Vending Equipment

[Cancel](#) [Save](#) [Back](#)

Enter the vendor data below.

Vendor Name and Mailing Address

Vendor Name: *	<input style="width: 90%;" type="text" value="AABB COMPANY"/>		
Street Number:	<input style="width: 80%;" type="text" value="1111"/>	Street Direction:	<div style="border: 1px solid #ccc; padding: 2px;">--- Please Select ---</div>
Street Name or P.O. Box:	<input style="width: 80%;" type="text" value="STREET"/>	Street Type:	<div style="border: 1px solid #ccc; padding: 2px;">STREET</div>
Suite/Room:	<input style="width: 80%;" type="text"/>	City:	<div style="border: 1px solid #ccc; padding: 2px;">SAN FRANCISCO</div>
State:	<div style="border: 1px solid #ccc; padding: 2px;">California</div>	Zip:	<div style="border: 1px solid #ccc; padding: 2px;">94111</div>
Country:	<div style="border: 1px solid #ccc; padding: 2px;">United States</div>		

	Model and Description	Delete
Create Section		
1.	<input style="width: 95%;" type="text" value="SODA VENDING MACHINE"/>	<input type="checkbox"/>
2.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
3.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
4.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
5.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
6.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
7.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
8.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
9.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>
10.	<input style="width: 95%;" type="text"/>	<input type="checkbox"/>

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Fig. 24


- ❖ **Other Businesses** - Follow the same steps as described in the Leased Equipment section (Page 31) of this document to update this section (Fig. 25 to 26).

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Other Businesses

To add a new business, click "Create Business." To edit an existing business owner's information click "View/Update." To delete a business, click "Delete Business."

[Create Business](#) [Back](#)

Owner's Name	Street	City	State, Zip	Type of Business/Property	Operation
AAAA COMPANY		SAN FRANCISCO	CA	RETAIL	View/Update Delete Business
CCC COMPANY		SAN FRANCISCO	CA	WHOLESALE	View/Update Delete Business

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Fig. 25

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Other Businesses

[Cancel](#) [Save](#) [Back](#)

Enter the data below regarding other companies doing business at this location.

Other Business Name and Mailing Address			
Business Name: *	<input type="text"/>		
Street Number:	<input type="text"/>	Street Direction:	<div>--- Please Select --- ?</div>
Street Name or P.O. Box: ?	<input type="text"/>	Street Type:	<div>--- Please Select --- ?</div>
Suite/Room:	<input type="text"/>	City:	<input type="text" value="SAN FRANCISCO"/>
State:	<div>California v</div>	Zip:	<div><input type="text"/> <input type="text"/></div>
Country:	<div>United States v</div>		
Type of Business: *	<input type="text" value="RETAIL"/>		

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Fig. 26

STEP 5– Certification (Final step)

This is the “Submit Statement” or “Certification” step of the e-File process. It is strongly recommended that you review all the existing and new information you submitted/reported before you start this step. You **CANNOT** go back to the previous steps once you submit your statement. To complete the e-File process, do the following:

1. Click “Next” on “Declaration of Property Belonging to Others” screen to start “Certification” process.
2. If the “Certification” screen shows “Certification Incomplete,” update and/or correct those sections so they are complete (Fig. 27). You cannot complete the process unless you address the necessary corrections.
3. Complete the Declaration section (Fig. 28). This section includes Ownership Type and Business Description, Federal Employer ID number, Preparer Information, and Additional Information. Save the information by clicking “Save.”
4. Click “Submit Statement.” A message window will appear with an option to “Review” or “Submit.” If you click “Review,” a new window will appear showing the unsubmitted Form 571-L Business Property Statement. You can print the form for you to review before submitting by clicking “Print.”
5. Click “Submit” to submit your business property statement. A “**Certification Complete**” screen will appear showing your **Company Name, DBA, Company Account Number, Confirmation Number, and Date of Submission** (Fig. 29).
6. Print a “Certification Complete” screen for your records.

Currently, the system does not accept any supporting documents through the e-Filing portal. If you have supporting documents, please mail them along with a copy of the “**Certification Complete**” screen page. By including a copy of the “Certification Complete” screen page allows us to accurately match your supporting documents to your original e-Filed statement. Mail the packet to the address below:


Office of the Assessor-Recorder
Attn: Business Personal Property Division
1155 Market Street, 5th Floor
San Francisco, CA 94103

Carmen Chu
 Assessor-Recorder
 1155 Market Street, 5th Floor
 San Francisco, CA 94103
 (415) 554-5531
askbpp@sfgov.org

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Certification Incomplete

The following corrections must be made before you can submit your statement.

Page/Link	Description
Step 2 (f)	Required information is missing on the General Info page, Step 2 (f). Please fill out all required fields as designated by an asterisk (*). Save the data, then return to this certification page.
Step 4	There are no items declared in "Property Belonging to Others". If you do not have any Leased Equipment, Vending Equipment or Other Business to report then click here to acknowledge . Otherwise, finish Step 4 before submitting your statement.

If you have made any changes from this page, [Click Here to re-evaluate your corrections](#).

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Fig. 27

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Step 1 | Step 2 | Step 3 | Step 4 | **Step 5**

[Ownership Info](#) | [General Info](#) | [Your Property](#) | [Others' Property](#) | **[Certification](#)**

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Certification

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Certification Incomplete

- Certification is not complete until you submit your statement via the "**Submit Statement**" link below. Upon certification you will receive a "Certification Complete" message along with a confirmation number.
- If you do not wish to certify at this time, you may click the "**Save**" link to retain any changes you have made to this form.
- To review your current form, prior to submission, you may click the "**View Form**" link.

Note: The following declaration must be completed. If you do not do so, it may result in penalties. Amendments must be filed via hard copy once you have certified.

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the assessee in this statement at 12:01 a.m. on January 1, 2017; and, I further declare that I am authorized to submit this statement as the assessee, or on behalf of the assessee and all co-owners and/or partners. The following declaration must be completed and submitted. If you do not do so, it may result in penalties.

Ownership Type and Business Description	
Ownership Type: *	Business Description: *
<div style="border: 1px solid black; padding: 2px;">Proprietorship</div>	<div style="border: 1px solid black; padding: 2px;">Retail</div>
Please enter your Federal Employer ID number to certify this Statement	
Federal Employer ID #: <div style="border: 1px solid black; width: 150px; height: 20px;"></div>	
Preparer Information	
Preparer's Name: *	Preparer's Job Title: *
<div style="border: 1px solid black; width: 150px; height: 20px;"></div>	<div style="border: 1px solid black; width: 150px; height: 20px;"></div>
Full Address: * ? <div style="border: 1px solid black; width: 400px; height: 20px;"></div>	
Telephone #: * (<div style="border: 1px solid black; width: 30px; height: 20px;"></div>) <div style="border: 1px solid black; width: 30px; height: 20px;"></div> - <div style="border: 1px solid black; width: 30px; height: 20px;"></div> Extn # <div style="border: 1px solid black; width: 50px; height: 20px;"></div>	
Additional Information ?	
Name of Assessee or Authorized Agent: *	Title:
<div style="border: 1px solid black; width: 150px; height: 20px;"></div> ?	<div style="border: 1px solid black; width: 150px; height: 20px;"></div>
Name of Legal Entity (other than DBA): <div style="border: 1px solid black; width: 150px; height: 20px;"></div>	

[Save](#)

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Fig. 28



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Company Number: [REDACTED]

Certification Complete

Thank you for electronically filing form 571-L. Listed below is your confirmation number.

Company Name: [REDACTED]
DBA: [REDACTED]
Company Number: [REDACTED]
Confirmation Number: 2017312083001001
Date of Submission: January 27, 2017, 11:52:37 AM

You may view or print a copy of your e-Filed statement by clicking "View Statement" or "Print Statement" below.

[Print This Page](#) [View Statement](#) [Print Statement](#)

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Fig. 29


II (B). BUSINESS MOVED/CLOSED/SOLD

The “Questionnaire” screen includes four additional questions (indicated in the red box below) (Fig. 30). Depending on your selection, you will be redirected to another page to provide additional information. Please refer to the appropriate section below.

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Questionnaire

Please select any of the boxes below that apply to you, then click the 'Submit' button. If none of the boxes apply to you, simply click the 'Submit' button to continue.

If you check any of the boxes on this page, and click the 'Submit' button, you will not be able to use our e-file system to file your Form 571-L. At this time, we are not able to accept electronic submissions for filers in any of the categories listed below, including filers that have no email address.

Note: We value your privacy and confidentiality. All of the information you provide us is **confidential**, including your email address. We do **not** share, sell, or in any way distribute your email address to any outside parties.

If you have any questions you may call (415) 554-5531 or send email to askbpp@sfgov.org.

- ☐ I own a residential property, such as an apartment house, and I rent it out as a business.
If your business is an apartment (or short-term rental), please contact our office to obtain Form 571-R (or 571-STR) by calling 415-554-5531 or email askbpp@sfgov.org.
- ☐ I have equipment out on lease to others.
- ☐ I am a bank or financial institution recognized by the State of California.
- ☐ I am an insurance company recognized by the State of California.
- ☐ I am a biotech company.
- ☐ I currently own or lease one or more billboards within San Francisco County.
- ☐ I do NOT have an email address. (You must have an email address to use our e-file system to file your 571-L.)

If the **LOCATION** of your business (printed on page 1 of the Notice you received) has **changed**, please select one of the choices below to indicate if it was **moved**, **closed**, or **sold**.

If only your **mailing address** changed, DO NOT select any of the choices below and continue to e-file. You will have an opportunity during the filing process to update your mailing address, and clicking one of the options below in error may result in duplicate accounts and assessments in our system.

- ☐ My business moved to another location **within** San Francisco County.
- ☐ My business moved to another location **outside** San Francisco County.
- ☐ My business closed.
- ☐ My business was sold.

[Submit](#) [Clear Page](#)

IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Fig. 30

II (BI). BUSINESS MOVED TO ANOTHER LOCATION WITHIN SAN FRANCISCO COUNTY


If your business moved to another location **within** San Francisco County, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 31). Click “Save” and “Submit” to go to the next screen.

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Moved to New Location in San Francisco

Additional Information Needed

You have indicated that your business has moved within the county. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form

Date moved : * [REDACTED] (MM/DD/YYYY)

New DBA Name * [REDACTED] ?

Contact Information

Contact Name: * [REDACTED] Job Title: * [REDACTED]

Phone #: * [REDACTED]

E-mail: * [REDACTED]

Lease Termination Date: * [REDACTED] (MM/DD/YYYY)

Name of Sub-tenant, if any: [REDACTED]

New Mailing Address

Street Number: [REDACTED] ? Street Direction: * [REDACTED] ?

Street Name/P.O.: * [REDACTED] ? Street Type: * [REDACTED]

Suite/Room: [REDACTED] City: * [REDACTED]

State: * [REDACTED] Zip: * [REDACTED]

New Location Property Address

Street Number: * [REDACTED] Street Direction: * [REDACTED] ?

Street Name: * [REDACTED] Street Type: * [REDACTED]

Suite/Room: [REDACTED] City: SAN FRANCISCO

State: California Zip: * [REDACTED]

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Fig. 31

Move date is before the lien date


If the move date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 32). When you are finished, click “Submit.”

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Moved to New Location in San Francisco Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

Declaration

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

Ownership Type and Business Description

Ownership Type: *	[REDACTED] ▼	Business Description: *	Retail ▼
-------------------	--------------	-------------------------	----------

Please enter your Federal Employer ID number to certify this Statement

Federal Employer ID #: [REDACTED]

Preparer Information

Preparer's Name: *	[REDACTED]	Preparer's Job Title: *	[REDACTED]
Full Address: *	[REDACTED]		
Telephone #: *	[REDACTED]	Extn #	[REDACTED]

Additional Information ?

Name of Assessee or Authorized Agent: *	[REDACTED] ?	Title:	[REDACTED]
Name of Legal Entity (other than DBA):	[REDACTED]		

[Back](#) [Save](#) [Submit](#)

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Fig. 32

Once, you click “Submit,” you will be directed to the “Moved to New Location in San Francisco Certification Complete” page (Fig. 33).

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Moved to New Location in San Francisco Certification Complete

Your business **MOVED WITHIN THE COUNTY** on **12/31/2016**. Updated information is listed below. Please print this page for your records.

Please Note

Within three weeks, you will receive 2017 Notice of Requirement to File for your new location with the information provided. If you have not received it within 3 weeks, send an email to askbpp@sfgov.org or call 415-554-5531 for assistance. This property account [REDACTED] will be inactivated within 20 business days.

Company Name: [REDACTED]

DBA: [REDACTED]

Company Number: [REDACTED]

Confirmation Number: CNI31233000120170127

Submission Date: 2017-01-27 13:32:30.000000

Contact Information

Contact Name: [REDACTED]

Title: [REDACTED]

Phone #: [REDACTED]

E-mail: [REDACTED]

Lease Termination Date: [REDACTED]

Name of Sub-tenant: [REDACTED]

New Mailing Address

Street Number: [REDACTED]Street Direction: [REDACTED]

Street Name/P.O.: [REDACTED]Street Type: [REDACTED]

Suite/Room.: [REDACTED]City: [REDACTED]

State: [REDACTED]Zip: [REDACTED]

New Location Property Address

Street Number: [REDACTED]Street Direction: [REDACTED]

Street Name/P.O.: [REDACTED]Street Type: [REDACTED]

Suite/Room.: [REDACTED]City: [REDACTED]

State: [REDACTED]Zip: [REDACTED]

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Fig. 33

Move date is after the lien date

If the move date you indicated is **after** the lien date, you will be directed to the “Continue e-Filing” page (Fig. 34).

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Log Off | Remarks | 571-L Instructions | Help

571-L Business Property Statement - 2017 Company Number: [REDACTED] | View Form

 **Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2017 (R&T Code Sec. 2192), you are still required to complete the filing of your 2017 Business Personal Property taxes statement.

Note: Some information you have just entered may be requested again in subsequent pages. We will use the information you provided on your new business location to update our records for the 2018 filing season.

Please click the link below to begin this process

[Begin eFiling](#)


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Fig. 34

Once you click “Begin e-Filing,” you will then be taken to the “Ownership” page, which is Step 1 of the e-Filing process outlined in Section II (A) of this manual.

II (BII) BUSINESS MOVED TO ANOTHER LOCATION OUTSIDE SAN FRANCISCO COUNTY

If your business moved to another location **outside** San Francisco County, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 35). Click “Save” and “Submit” to go to the next screen.



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571-L Business Property Statement - 2017

Company Number:

Closure of Account

Additional Information Needed

You have indicated that your business has moved out of the county. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form

Date moved : * (MM/DD/YYYY)

Contact Information

Contact Name: *

Job Title: *

Phone #: * () - Ext.

E-mail: *

Lease Termination Date: * (MM/DD/YYYY)

Name of Sub-tenant, if any:

New Mailing Address

Street Number: ?

Street Direction: * ?

Street Name/P.O.: * ?

Street Type: *

Suite/Room:

City: *

State: *

Zip: *

[Back](#) [Save](#) [Submit](#)

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#)

Fig. 35

Page | 46

Move date is before the lien date


If the move date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 36). When you are finished, click “Submit.”

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Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2017

Company Number: [REDACTED]



Closure of Account Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

Declaration

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

Ownership Type and Business Description

Ownership Type: *	[REDACTED] v	Business Description: *	Retail v
-------------------	--------------	-------------------------	----------

Please enter your Federal Employer ID number to certify this Statement

Federal Employer ID #: [REDACTED]

Preparer Information

Preparer's Name: *	[REDACTED]	Preparer's Job Title: *	[REDACTED]
Full Address: * ?	[REDACTED]		
Telephone #: *	([REDACTED]) [REDACTED] - [REDACTED]	Extn #	00000

Additional Information ?

Name of Assessee or Authorized Agent: *	[REDACTED] ?	Title:	[REDACTED]
Name of Legal Entity (other than DBA):	[REDACTED]		

Back Save Submit

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Fig. 36


Once, you click “Submit,” you will be directed to the “Closure of Account Certification Complete” page (Fig. 37).

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571-L Business Property Statement - 2017

Company Number: [REDACTED]



Closure of Account Certification Complete

Your business **MOVED OUT OF THE COUNTY** on **12/31/2016**. Updated information is listed below. Please print this page for your records.

Please Note

This property account ([REDACTED]) will be inactivated within 20 business days.

Company Name: [REDACTED]

DBA: [REDACTED]

Company Number: [REDACTED]

Confirmation Number: CNO31233300120170127

Submission Date: 2017-01-27 14:48:44.000000

Contact Information

Contact Name: [REDACTED]

Title: [REDACTED]

Phone #: [REDACTED]

E-mail: [REDACTED]

Lease Termination Date: [REDACTED]

Name of Sub-tenant: [REDACTED]

New Mailing Address

Street Number: [REDACTED] Street Direction: [REDACTED]

Street Name/P.O.: [REDACTED] Street Type: [REDACTED]

Suite/Room.: [REDACTED] City: [REDACTED]

State: [REDACTED] Zip: [REDACTED]

Print This Page

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Fig. 37

Move date is after the lien date

If the move date you indicated is **after** the lien date, you will be directed to the “Continue e-Filing” page (Fig. 38).

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[Log Off](#) | [Remarks](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2017 Company Number: | [View Form](#)

 **Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2017 (R&T Code Sec. 2192), you are still required to complete the filing of your 2017 Business Personal Property taxes statement.

Note: Some information you have just entered may be requested again in subsequent pages. We will use the information you provided on your new business location to update our records for the 2018 filing season.

Please click the link below to begin this process

[**Begin eFiling**](#)

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Fig. 38

Once you click “Begin e-Filing,” you will then be taken to the “Ownership” page, which is Step 1 of the e-Filing process outlined in Section II (A) of this manual.


II (BIII). BUSINESS CLOSED

If your business closed, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 39). Click “Save” and “Submit” to go to the next screen.

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Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2017Company Number: [REDACTED]



Closure of Business

Additional Information Needed

You have indicated that your business has closed. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form

Date closed : *12/02/2016 (MM/DD/YYYY)

Contact Information

Contact Name : * [REDACTED]Job Title : * [REDACTED]

Phone # : * ([REDACTED]) - [REDACTED] Ext. [REDACTED]

E-mail : * [REDACTED]

Lease Termination Date : * [REDACTED] (MM/DD/YYYY)

Name of Sub-tenant, if any: [REDACTED]

New Mailing Address

Street Number: [REDACTED] ?Street Direction: * [REDACTED] --- ?

Street Name/P.O. : * [REDACTED] ?Street Type : * [REDACTED] ---

Suite/Room: [REDACTED]City : * [REDACTED]

State : * [REDACTED] ↓Zip : * [REDACTED]

[Back](#) [Save](#) [Submit](#)

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Fig. 39

Closing date is before the lien date

If the closing date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 40). When you are finished, click "Submit."

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571-L Business Property Statement - 2017

Company Number:



Closure of Business Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

Declaration

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

Ownership Type and Business Description

Ownership Type: *	<input type="text"/>	Business Description: *	<input type="text"/>
-------------------	----------------------	-------------------------	----------------------

Please enter your Federal Employer ID number to certify this Statement

Federal Employer ID #:

Preparer Information

Preparer's Name: *	<input type="text"/>	Preparer's Job Title: *	<input type="text"/>
Full Address: * ?	<input type="text"/>		
Telephone #: *	(<input type="text"/>) <input type="text"/> - <input type="text"/>	Extn #	<input type="text"/>

Additional Information ?

Name of Assessee or Authorized Agent: *	<input type="text"/> ?	Title:	<input type="text"/>
Name of Legal Entity (other than DBA):	<input type="text"/>		

[Back](#) [Save](#) [Submit](#)

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Fig. 40


After submission, you will be directed to the “Closure of Business Certification Complete” page (Fig. 41).

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Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2017

Company Number: [REDACTED]



Closure of Business Certification Complete

Your business was **CLOSED** on **12/02/2016**. Updated information is listed below. Please print this page for your records.

Please Note

This property account ([REDACTED]) will be inactivated within 20 business days.

Company Name: [REDACTED]

DBA: [REDACTED]

Company Number: [REDACTED]

Confirmation Number: CNC30485200120170207

Submission Date: 2017-02-07 11:27:47.000000

Contact Information

Contact Name: [REDACTED]

Title: [REDACTED]

Phone #: [REDACTED]

E-mail: [REDACTED]

Lease Termination Date: [REDACTED]

Name of Sub-tenant:

New Mailing Address

Street Number: [REDACTED] Street Direction: [REDACTED]

Street Name/P.O.: [REDACTED] Street Type: [REDACTED]

Suite/Room.: [REDACTED] City: [REDACTED]

State: [REDACTED] Zip: [REDACTED]

Print This Page

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Fig. 41

Closing date is after the lien date

If the closing date you indicated is **after** the lien date, you will be directed to the “Continue e-Filing” page (Fig. 42).

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571-L Business Property Statement - 2017 Company Number: | [View Form](#)

 **Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2017 ([R&T Code Sec. 2192](#)), you are still required to complete the filing of your 2017 Business Personal Property taxes statement.

Note: Some information you have just entered may be requested again in subsequent pages. We will use the information you provided on your new business location to update our records for the 2018 filing season.

Please click the link below to begin this process

[**Begin eFiling**](#)

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#) | [Paper Filing](#) |

Fig. 42

Once you click “Begin e-Filing,” you will then be taken to the “Ownership” page, which is Step 1 of the e-Filing process outlined in Section II (A) of this manual.


II (BIV). BUSINESS SOLD

If your business was sold, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 43). Click “Save” and “Submit” to go to the next screen.

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571-L Business Property Statement - 2017 Company Number: XXXXXXXXXX



Sale of Business

Additional Information Needed

You have indicated that your business was sold. Please provide the following information and click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form

Date sold : * (MM/DD/YYYY)

New Owner's Contact Information

Owner/Entity: *

Contact Name: *

Job Title: *

Phone #: * () - Ext.

E-mail: *

Seller's New Mailing Address

Street Number: ?

Street Direction: * --- ?

Street Name/P.O.: * ?

Street Type: *

Suite/Room:

City: *

State: *

Zip: *

[Back](#) [Save](#) [Submit](#)

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Fig. 43

Sale date is before the lien date


If the sale date you indicated is **before** the lien date, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 44). When you are finished, click "Submit."

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571-L Business Property Statement - 2017

Company Number:



Sale of Business Certification

Your company status has been saved. To finalize this process, fill out the information below and click "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any changes you have made to this form.

Declaration

By submitting this form you declare under penalty of perjury under the laws of the State of California that you are authorized to submit this information as the assessee, or on behalf of the assessee and all co-owners and/or partners. Furthermore, you certify that the information provided thus far is true, correct, and complete to the best of your knowledge and belief.

Ownership Type and Business Description

Ownership Type: *	<input type="text"/>	Business Description: *	<input type="text"/>
-------------------	----------------------	-------------------------	----------------------

Please enter your Federal Employer ID number to certify this Statement

Federal Employer ID #:	<input type="text"/>
------------------------	----------------------

Preparer Information

Preparer's Name: *	<input type="text"/>	Preparer's Job Title: *	<input type="text"/>
Full Address: * ?	<input type="text"/>		
Telephone #: *	(<input type="text"/>) <input type="text"/> - <input type="text"/>	Extn #	<input type="text"/>

Additional Information ?

Name of Assessee or Authorized Agent: *	<input type="text"/> ?	Title:	<input type="text"/>
Name of Legal Entity (other than DBA):	<input type="text"/>		

[Back](#) [Save](#) [Submit](#)

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Fig. 44

Sale date is after the lien date

If the sale date you indicated is **after** the lien date, you will be directed to the “Continue e-Filing” page (Fig. 45).

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[Log Off](#) | [Remarks](#) | [571-L Instructions](#) | [Help](#)

571-L Business Property Statement - 2017 Company Number: | [View Form](#)

 **Continue eFiling**

Since your business moved within the county after the Lien Date of January 01, 2017 (R&T Code Sec. 2192), you are still required to complete the filing of your 2017 Business Personal Property taxes statement.

Note: Some information you have just entered may be requested again in subsequent pages. We will use the information you provided on your new business location to update our records for the 2018 filing season.

Please click the link below to begin this process

[**Begin eFiling**](#)

[Copyright](#) | [Links](#) | [FAQ](#) | [Assessor](#) | [Paper Filing](#)

Fig. 45

Once you click “Begin e-Filing,” you will then be taken to the “Ownership” page, which is Step 1 of the e-Filing process outlined in Section II (A) of this manual.



Filing a Form 571-L Paper Document

III

III. FILING A FORM 571-L/R/STR PAPER DOCUMENT

III (A). FILE BY MAIL USER'S GUIDE (DOWNLOAD, PRINT, COMPLETE, SIGN & MAIL)

This guide will provide businesses using our “File by Mail” program with step-by-step instructions on how to download and print hard copies of the Form 571-L Business Property Statement, Form 571-R Apartment House Property Statement, or Form 571-STR Short Term Rental Property Statement, whichever applicable.

In February 2018, you received one of the following four Notices: (1) *Notice of Requirement to File 2018 Form 571-L Business Property Statement*, (2) *Notice to e-File 2018 Form 571-L Business Property Statement*, (3) *Direct Bill Notice*, or (4) *Low Value Exemption Notice*. Use the Account Number and PIN printed on the Notice to access your business account online.

For more information, please refer to the Frequently Asked Questions (FAQs) section of this document on Page 75 to 88.


The minimum system requirements are as follows:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, Mobile Devices are **NOT** supported at this time.

INSTRUCTIONS:

1. Go to the San Francisco County Assessor's e-Filing website, www.sfassessor.org/efile, and click on "[FILE 2018 STATEMENT](#)" (Fig. 46).



Current Statement

[FILE 2018 STATEMENT](#)

Prior Statement

[VIEW STATEMENT](#)

IMPORTANT DATES TO REMEMBER :

- April 2 - Due Date for Form 571-L Business Property Statement.
- May 7 - Last Day to File
Any statements postmarked after May 7 will have a 10% penalty assessed in accordance with Section 441(b) of the California Revenue and Taxation Code.
- May 31 - Last Day to Use E-Filing System. Thereafter, this site will become unavailable for filing statements and you must file hardcopy. However, all statements filed electronically may still be viewed after this date.

IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- **Note:** Apple Safari, Google Chrome, or Mobile Devices are NOT supported at this time.
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Business Property Statement - 2018

Welcome to the County Assessor's e-File System!

Current Statement	Prior Statement
FILE 2018 STATEMENT	VIEW STATEMENT

IMPORTANT DATES TO REMEMBER :

- April 2 - Due Date for Form 571-L Business Property Statement.
- May 7 - Last Day to File
Any statements postmarked after May 7 will have a 10% penalty assessed in accordance with Section 441(b) of the California Revenue and Taxation Code.
- May 31 - Last Day to Use E-Filing System. Thereafter, this site will become unavailable for filing statements and you must file hardcopy. However, all statements filed electronically may still be viewed after this date.

IMPORTANT BROWSER REQUIREMENTS:

- If you are using Internet Explorer, we support versions 7.0 through 10
- If you are using Mozilla FireFox, the minimum requirement is version 3.0
- **Note:** Apple Safari, Google Chrome, or Mobile Devices are NOT supported at this time.
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

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Fig. 46

2. Follow the same steps as described in the II (A) on Page 8-11 to logon and/or retrieve your PIN as appropriate (Fig 47 & 48).

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Home | 571-L Instructions | Help

Business Property Statement - 2018



Logon

Please enter the nine-digit account number as it appears on the relevant notice you received:
Then enter the PIN, which is case-sensitive. For assistance, click "Help."

For Electronic Filing businesses, prior to submitting your filing, you may review and/or print a copy of your Form 571-L Business Property Statement. After filing, a confirmation number, date, and time will be provided for your records.

For Electronic Filing businesses, you do not have to complete your filing at one time. You may save your data at any time by clicking "Save". After logging in, if you feel additional information is necessary, please click and enter using the "Remarks" link at the top of any page.

Account #: * (Do not enter dashes or spaces.)
PIN: * (PIN is case sensitive.)
Business Account # (BAN): (Optional) (Refer to your Business Registration Certificate issued annually by the San Francisco Treasurer & Tax Collector's Office; enter the full 7-digit number) ?

[Submit](#) [Clear Page](#) [Forgot My Pin](#)

If you would like to receive future notices from our office in a language other than English, please complete and submit [this online request form](#). You can access translations of this year's notices by clicking here.

We are also gathering additional contact information to better communicate with you. Your information is strictly for office use only; the information will not be sold or distributed to a third party for any purpose. Participation is voluntary.


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Fig. 47

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571-L Business Property Statement - 2017



Forgot My PIN

To retrieve your PIN, please enter your nine-digit account number without dashes, the five-digit mailing address zip code, and the four-digit year for when your business opened.


Account Number: *	<input type="text"/>	(No spaces or dashes)
Mailing Address Zip Code: *	<input type="text"/>	
Year your business opened: *	<input type="text"/>	(YYYY)

[Return To Login](#) [Clear Form](#) [Retrieve My PIN](#)

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Fig. 48

3. Click on the “File by Mail” button as shown below (link on “clicking here”) (Fig. 49).



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Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2017

Company Number:

Welcome

Electronic Filing (E-File Directly Online)

Accessible: You can access your current and previous years filed statements anytime and anywhere there is an internet connection.

Accurate: Less mistakes in processing the return, because data is loaded electronically.

Convenient: The ability to file 24 hours a day 7 days a week. You may save your data anytime and complete your e-Filing later.

Efficient: Faster than mailing, save on postage and minimize usage of paper.

Reliable: A confirmation certification indicating the date and time of filing is issued after your return is submitted.

Green: Let's go green together. Use technology not paper.

Confidential: Only the owner of the Account Number and PIN can view Form 571-L statement, and it is not a public document.

If you do not have an email address or would like to file by mail, you may do so by [clicking here](#). Businesses that choose to file by mail must download their statement from this system and print, complete, and mail the Form 571-L statement to our office. If you have any questions, please call (415) 554-5331 or email askbpp@sfgov.org.

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Fig. 49

4. A prompt window will appear, then click on “[Form 571-L \[PDF\]](#)” (Fig. 50), “[Form 571-R/STR \[PDF\]](#)” (Fig. 51) or whichever applicable, to download the Form.

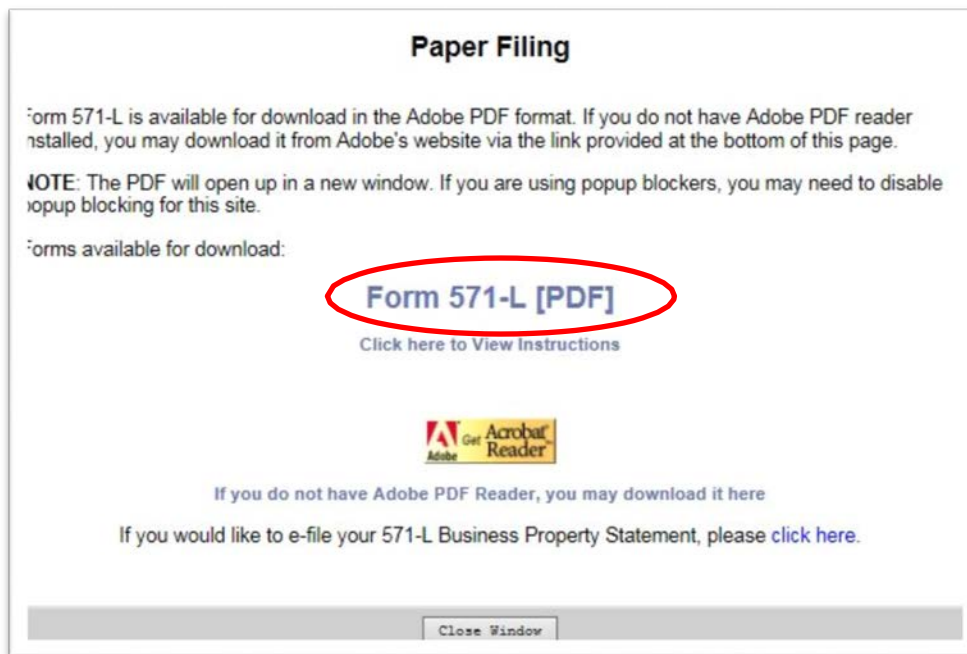


Fig. 50

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askbpp@sfgov.org

[Log Off](#) | [571-R Instructions](#) | [Help](#)

571-R Apartment House Property Statement - 2017

Company Number: XXXXXXXXXX



File By Mail

Electronic Filing is currently not supported for this Business Type.

To File by Mail, you must:

- (1) Download and Print the Form 571-R PDF below.
- (2) Fill out the form, according to the provided instructions.
- (3) Sign and mail the completed form to our office.

Form 571-R is available for download in the Adobe PDF format. If you do not have Adobe PDF reader installed, you may download it from Adobe's website via the link provided at the bottom of this page.

NOTE: The PDF will open up in a new window. If you are using popup blockers, you may need to disable popup blocking for this site.

Forms available for download:



[Click here to View Instructions and FAQs](#)



If you do not have Adobe PDF Reader, you may download it [here](#)

If you have any question you can contact our office via phone, fax, or e-mail:

Phone: (415) 554-5531 Fax: (415) 554-5544 Email: askbpp@sfgov.org

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Fig. 51

5. After clicking on “Form 571-L [PDF]” (Fig. 52), “Form 571-R/STR [PDF]” (Fig. 53) the browser will open a new tab containing the Form 571-L, Form 571-R or Form 571-STR and schedules. Please check all the information to ensure accuracy.


FORM 571-L		CARMEN CHU, ASSESSOR-RECORDER BUSINESS PROPERTY STATEMENT CITY & COUNTY OF SAN FRANCISCO 1155 Market St., 5 th Floor, San Francisco, CA 94103 • asktpp@sfgov.org • www.sfassessor.org		2017	
RETURN THIS ORIGINAL FORM. COPIES WILL NOT BE ACCEPTED. FILE RETURN BY APRIL 3, 2017					
DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION AS OF 12:01 A.M., JANUARY 1, 2017					
ACCOUNT NUMBER	LA BY	LOCATION OF RECORDS	ROLL CODE	ROUTING	VOL BLK LOT
			U	0000	
NAME AND MAILING ADDRESS (Make necessary corrections to the printed name and mailing address)					
			LOCATION OF PROPERTY (File a separate statement for each location)		
PART I: GENERAL INFORMATION					
COMPLETE (a) THRU (g)					
a. Enter type of business: _____			f. Enter name and telephone number of authorized person to contact at location of accounting records: _____		
b. Enter local telephone number () _____ FAX number () _____			g. During the period of January 1, 2016 through December 31, 2016:		
c. Do you own the land at this business location? <input type="checkbox"/> Yes <input type="checkbox"/> No			(1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity? <input type="checkbox"/> Yes <input type="checkbox"/> No		
d. When did you start business at this location? DATE: _____			(2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of acquisition? <input type="checkbox"/> Yes <input type="checkbox"/> No		
e. Enter location of general ledger and all related accounting records (include zip code): _____			(3) If YES to both questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.		
PART II: DECLARATION OF PROPERTY BELONGING TO YOU (attach schedule for any adjustment to cost)			COST (omit cents) (see instructions)		ASSESSOR'S USE ONLY
1. Supplies					

Fig. 52


FORM 571-R		CARMEN CHU, ASSESSOR-RECORDER APARTMENT HOUSE PROPERTY STATEMENT CITY & COUNTY OF SAN FRANCISCO 1155 Market St., 5 th Floor, San Francisco, CA 94103 • asktpp@sfgov.org • www.sfassessor.org		2017	
RETURN THIS ORIGINAL FORM. COPIES WILL NOT BE ACCEPTED. FILE RETURN BY APRIL 3, 2017					
DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION AS OF 12:01 A.M., JANUARY 1, 2017					
ACCOUNT NUMBER	LA BY		LA BY		
NAME AND MAILING ADDRESS (Make necessary corrections to the printed name and mailing address)					
			LOCATION OF THE PROPERTY (street, city) (File a separate statement for each location)		
Local Telephone Number () _____ Fax Number () _____			2. Enter the total number of units for the location listed. _____ Do you live in one of the units? <input type="checkbox"/> Yes <input type="checkbox"/> No		
E-Mail Address _____			If yes, enter the unit number _____		
Enter location of general ledger and all related accounting records (include zip code): _____			3. During the period of January 1, 2016 through December 31, 2016:		
STREET	CITY	STATE	ZIP	(1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Enter name and telephone number of authorized person to contact at location of accounting records: _____			(2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of acquisition? <input type="checkbox"/> Yes <input type="checkbox"/> No		
CAREFULLY READ AND FOLLOW THE ACCOMPANYING INSTRUCTIONS.					
1. If you no longer own this property as of January 1 of this year, show the name and mailing address of the new owner:					
Name _____					
Mailing Address _____					
City and State _____ Zip Code _____					
4. Do any other individuals, partnerships or corporations do business or own personal property (other than household furniture and personal effects of your tenants) located on your premises? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list below.					ASSESSOR'S USE ONLY


Fig. 53

6. Print the Form and schedules.
7. Please submit a document with an Assessor's Office generated barcode on it. A barcode has to appear on the front page (see images Fig. 52-53). If there is no barcode or only numbers show up, it means the barcode has been incorrectly printed. Please review if your browser meets our browser requirement. If not, please download one of the browsers under Important Browser Requirements (Fig. 46) and try again.

If you still have difficulty to get the barcode printed, please follow the following steps:

Using a PDF reader plugin:

To change from using the built-in PDF viewer to your PDF reader plugin:

- a) Click the menu button  and choose Options.
- b) Select the Applications panel.
- c) Find **Portable Document Format (PDF)** on the list and click on it to select it.
- d) Click on the drop-down arrow in the **Action** column for the above entry and select **Use PDF reader name (in Firefox)** (Fig. 54).

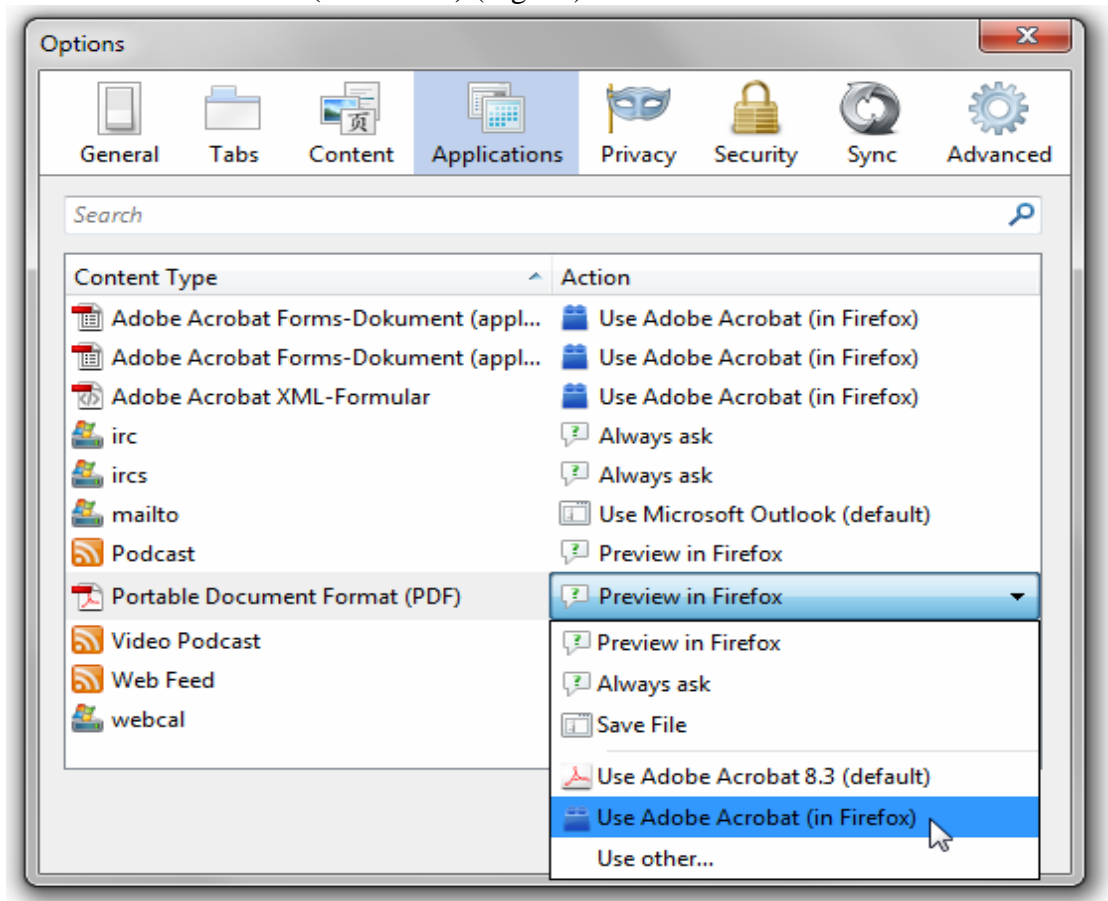


Fig. 54

8. Complete the Form 571-L, Form 571-R or Form 571-STR by filling in all the necessary information and data.
9. After completing, reviewing and signing the Form, please mail it to:

Office of the Assessor-Recorder
Attn: Business Personal Property Division
1155 Market Street, 5th Floor
San Francisco, CA 94103

III (B). INSTRUCTIONS FOR FILING THE FORM 571-L

(See Appendix for Sample Forms)

Owner name and DBA name

Please make sure that the information regarding the Owner Name and DBA name are pre-printed correctly on the Form 571-L. If the assessor's information regarding your property is not up to date on the pre-printed Form, please line through the incorrect information and write the correct information on the Form.

Property location and mailing address

It is important that this information is kept up to date with the Assessor's Office. The property location is the address of the business. The mailing address is the address you would like to have the Notice and Tax Bill mailed. It is our office policy not to mail the Notice to agents' addresses. However, if you are a sole proprietor and would like to have the Notice to be mailed to your home, or P.O. Box, that is perfectly acceptable. If your mailing address has changed, please contact our office immediately to update the information.

Part I. General Information (a) through (g)

All the information pre-printed under this section of the Business Property Statement is vital to the Assessor's Office in keeping accurate records of your business as well as mailing out the Tax Bill. Although the email address is optional, it would be helpful information to assist us in contacting you.

Part II. Declaration of Property Belonging to You

This section of the Business property Statement is where you declare the equipment that belongs to you and the equipment that you may be leasing to others. For most small businesses, you will only need to complete sections 1, 2 and 4 of Part II of the Business Property Statement.

Supplies

Supplies are those items that are used in the ordinary course of business and are not intended for sale or lease. The reportable supplies are those supplies on hand as of the January 1st lien date. Types of supplies could include stationary and office supplies, janitorial supplies, chemical supplies and computer supplies. Your business may be small to estimate the amount of supplies. If your business maintains an Income statement, you would use the year-end balances as of December 31st of the previous calendar year and take the average of 12 months. For example, you would take the

Office Supplies year-end total of cost \$12,000/12 months=\$1,000 worth of supplies to be reported on Page 1, Part II line 1 of the Form.

Schedule A – Cost Details: Equipment

Everything reported under Schedule A of the Form relates to Part II, line 2, Equipment on page 1 of the Form 571-L. Include expensed equipment and fully-depreciated equipment on this Schedule. Also include sales or use tax, freight and installation costs. Equipment should be reported by each calendar year of acquisition. To calculate this, add the totals of all equipment acquired in any specific year. Do not report equipment that has been removed from the site or disposed of. The disposal should be deducted from the year the equipment was originally acquired. Please do not report negative numbers or cents. Each cost should be rounded to the nearest dollar.

The equipment reported on this schedule is divided into five categories:

1. Machinery and Equipment for Industry, Profession or Trade
2. Office Furniture and Equipment
3. Other Equipment
4. Tools, Molds, Dies and Jigs
5. (a) Personal Computers
(b) Local Area Network (LAN) Equipment and Mainframes

1. Machinery and Equipment for Industry, Profession, or Trade (Schedule A, column 1)

The equipment reported under this category would include equipment specific to your trade, industry, or profession. If your business is a restaurant, the type of equipment you would report is restaurant equipment. This might include refrigerators, stoves, freezers and various other pieces of equipment related to the restaurant industry. This is why it is important to list the type of business under (a) in Part I. General Information section of the Form. This will assist the assessor in determining the life of the equipment.

2. Office Furniture and Equipment (Schedule A, column 2)

This category consists of furniture and office equipment.

3. Other Equipment (Schedule A, column 3)

This category includes the special types of equipment that do not fit into any other categories. This section of the Form asks you to describe the type of equipment that you report. Some types of the equipment that would fit into this category are: telephones, lab equipment, exercise equipment, fax machines, copiers, unlicensed vehicles and point of sales equipment.

4 Tools, Molds, Dies and Jigs (Schedule A, column 4)

This category would include tools, molds, dies and jigs.

5 (a) Personal Computers (Schedule A, column 5a)

This category mainly includes desktops, printers, laptops, monitors, notebooks, scanners and non-production computer components. **Application software should not be reported. However, operational software should be included.** Any computers used in any application directly related to manufacturing or used to control or monitor machinery and equipment should be reported in column 1 and should not be reported in this section.

(b) Local Area Network (LAN) Equipment and Mainframes (Schedule A, column 5b)

This category includes external storage devices, hubs, mainframes, routers, servers, switches, and LAN components. **Do not include application software in this category.**

Schedule B – Cost Detail: Buildings, Building Improvements, and/or Leasehold Improvements, Land Improvements, Land & Land Developments

Most small business would only have information for columns 1 and 2 of Schedule B. This is the section of Leasehold Tenant Improvement. It is divided into two types of leasehold improvements: structures and fixtures.

1. Structure Item Only

Improvements are classified as “structure item” when its primary use or purpose is for housing or accommodation of personnel, personalty or fixtures; or when the improvement has no direct application to the process or function of the trade, industry, or profession.

Examples:

- Air conditioning – office and building cooling
- Conveyors – for moving people
- Partitions – floor to ceiling
- Refrigeration systems – that are an integral part of the building

2. Fixture Only

Improvement is classified as “fixture” if its use or purpose directly applies to or augments the process or function of a trade, industry, or profession.

Examples:

- Air conditioning – process cooling
- Conveyors – for moving materials and products
- Partitions – annexed- less than floor to ceiling
- Refrigerators – walk in – unitized – including operating equipment

571-D Supplemental Schedule for Reporting Acquisitions and Disposals of Property Reported in Schedule B

This form is where you report all acquisitions or disposals from Schedule B, columns 1, 2, 3 or 4. For all practical purposes, you will only be dealing with columns 1 and 2. The form is divided into two sections. The first section is for **Additions**, and the second section is for **Disposals**. This form has space for information regarding both situations.

Part III. Declaration of Property Belonging to Others

If property belonging to others or their business entities is located on your premises, report the owner's name and mailing address. If it is leased equipment, read your agreement carefully and enter A (Lessor) or B (Lessee), and whether lessor or lessee has the tax obligation. For assessment purposes, the Assessor will consider, but is not bound to, the contractual agreement.

1. **LEASED EQUIPMENT.** Report the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, the total installed cost to purchase (including sales tax), and the annual rent; do not include in Schedule A or B (see No. 3, below).
2. **LEASE-PURCHASE OPTION EQUIPMENT.** Report here all equipment acquired on lease-purchase option on which the final payment remains to be made. Enter the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, the total installed cost to purchase (including sales tax), and the annual rent. If final payment has been made, report full cost in Schedule A or B (see No. 3, below).
3. **CAPITALIZED LEASED EQUIPMENT.** Report here all leased equipment that has been capitalized at the present value of the minimum lease payments on which a final payment remains to be made. Enter the year of acquisition, the year of manufacture, description of the leased property, the lease contract number or other identification number, and the total installed cost to purchase (including sales tax). Do not include in Schedule A or B unless final payment has been made.
4. **VENDING EQUIPMENT.** Report the model and description of the equipment; do not include in Schedule A.

5. OTHER BUSINESSES. Report other businesses on your premises.
6. GOVERNMENT-OWNED PROPERTY. If you possess or use government-owned land, improvements, or fixed equipment, or government-owned property is located on your premises, report the name and address of the agency which owns the property, and a description of the property.

Signature Requirements

The law requires that the Form 571-L Business Property Statement, regardless of where it is executed, shall be declared to be true under the **penalty of perjury** under the laws of the State of California. The Business Property Statement must be signed by the **business owner**, a duly-appointed fiduciary, or a person authorized on behalf of the owner.

In the case of a **corporation**, the Form 571-L must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign on behalf of the corporation. In the case of **partnership**, the Form 571-L must be signed by a partner or an authorized employee or agent.

In the case of a **Limited Liability Company (LLC)**, the Form 571-L must be signed by an LLC manager. If the Form 571-L is signed by someone other than a member of the bar, certified public accountant, a public accountant, and enrolled agent or a duly-appointed fiduciary, the San Francisco County Assessor-Recorder's Office requires a written authorization from the owner.

A Business Property Statement that is not signed and executed in accordance with the instructions is considered an invalid filing. The 10% penalty imposed by Section 463 of the Revenue and Taxation Code for failure to file or late filing is applicable to an unsigned or invalid Business Property Statement.

III (C). INSTRUCTIONS FOR FILING THE FORM 571-STR

(See Appendix for a Sample Form)

Part 1. General Information

Owner name

Please make sure that the information regarding the Owner Name is pre-printed correctly on the Form 571-STR. If the assessor's information regarding your property is not up to date on the pre-printed Form, please line through the incorrect information and write the correct information on the Form.

Property location and mailing address

It is important that this information is kept up to date with the Assessor's Office. The property location is the address of the business. The mailing address is the address you would like to have the Notice and Tax Bill mailed. It is our office policy not to mail the Notice to agents' addresses. If your mailing addresses changes, please contact our office immediately to update the information.

Part 2. Leased Property

If you own the personal property (i.e., furnishings and supplies) used / consumed by operating your short term rental business, then check YES. Otherwise, check NO and list the name and address of the owner along with a description of such personal property.

Part 3. Declaration of Property Belonging to You

This section of the Short Term Rental Statement is where you declare the furnishings and supplies used / consumed by operating your short term rental business.

Rental Supplies

This category is reported on page 1, line 4 of the 571-STR form, as one aggregated line item of total annual estimated cost of short term rental incidentals, including toilet paper, paper towels and other supplies consumed by the short term rental business.

Rental Furnishings

This category is listed by asset item, grouped by type and then reported as a total sum per grouping on page 1 of the 571-STR on lines 5, 6 and 7. As shown on page 2, Schedule A, of the 571-STR form, each short term rental asset shall be reported one by one per asset grouping along with the estimate cost and year that items were acquired.

Short term rental asset groupings are:

- Furniture and belongings, includes sofas, tables, chairs, mattresses, bed frames, etc. The total of this asset grouping is reported on page 1, line 5.
 - Bedroom #1
 - Bedroom #2
 - Bedroom #3
 - Bathroom
 - Living area
 - Dining and Kitchen
- Kitchen appliances, includes fridge, stove, microwave, toaster, dish washer, etc. The total of this asset grouping is reported on page 1, line 6.
- Other equipment, includes clothes washer & dryer, vacuum, computers, bikes, etc. The total of this asset grouping is reported on page 1, line 5.

Signature Requirements

The law requires that the Form 571-STR Business Property Statement, regardless of where it is executed, shall be declared to be true under the **penalty of perjury** under the laws of the State of California. The Business Property Statement must be signed by the **business owner**, a duly-appointed fiduciary, or a person authorized on behalf of the owner.

In the case of a **corporation**, the Form 571-STR must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign on behalf of the corporation. In the case of **partnership**, the Form 571-STR must be signed by a partner or an authorized employee or agent.

In the case of a **Limited Liability Company (LLC)**, the Form 571-STR must be signed by an LLC manager. If the Form 571-STR is signed by someone other than a member of the bar, certified public accountant, a public accountant, and enrolled agent or a duly-appointed fiduciary, the San Francisco County Assessor-Recorder's Office requires a written authorization from the owner.

A Short-Term Rental Property Statement that is not signed and executed in accordance with the instructions is considered an invalid filing. The 10% penalty imposed by Section 463 of the Revenue and Taxation Code for failure to file or late filing is applicable to an unsigned or invalid Short-Term Rental Property Statement.



Filing through the SDR System

IV

IV. FILING THROUGH THE STANDARD DATA RECORD (SDR) SYSTEM

Large business filers with multiple locations in one or more counties should use the SDR network to submit statements (data files) all in one upload. Programming and/or special software is required to create SDR data files in the approved XML schema. SDR users are required to register on-line at www.calbpsfile.org. To request a copy of the XML schema, print and submit a Schema Request Form from the Links menu on the homepage.

Filing instructions, help screens, and reference materials are provided on the SDR website. Filers using SDR can print a completed Form 571-L with schedules, filing confirmation and the exact time it was submitted. Statements are stored on-line for seven (7) years, so you can get a copy whenever you need one. Access to your statement(s) is protected with Login ID and Password. Statements are encrypted and transmitted on a secured site to protect confidential information.

IV (A). E-FILE AND SDR CAPABILITIES OVERVIEW

E-FILE	SDR
File One Statement at a Time Complete one statement at a time online (recommended for businesses with 1 to 20 locations in up to 10 counties)	File Many Statements at One Time One to 4000 statements (XML files) can be filed in 1 to 58 counties all at once.
View Statement Data Before Filing Use the PRINT function within e-File to review and print your statement before submitting the statement for certification.	View Statement Data Before Filing Use the SDR-style sheet.
Print Statement After Filing Print the Certification page with the confirmation number and date/time stamp. Use the PRINT function within e-File to print the submitted statement.	Print Statements After Filing No statement print capability available.
Confirmation and Date Each certified statement is assigned a confirmation number and date/time stamp.	Confirmation and Date Each statement is assigned an SDR confirmation number and date/time stamp.
Account Number Account Number is provided on the hardcopy statement/Invitation to e-File. You must use this number to file a statement. The Account Number is unique to each statement.	Account Number Account number is provided by the Assessor. A filer must use this number to submit a statement. The Account Number is unique to each statement.
PIN PIN is provided on the hardcopy statement/Invitation to e-File and must be used with the Account Number to e-File. The PIN is unique to each statement/account number.	PIN Not required to file.
Address Mail to address is required. Situs/property address is required.	Address Mail to address is required. Situs/property address is required.
Statement Type E-File provides fill-in support to create the Form 571-L. E-File does not support Forms 571-A, 571-F, 571-R, 571-STR, 571-P or LEQ; these forms must be submitted on hard copy.	Statement Type SDR supports 571-A, 571-F, Form 571-L, 571-P and 571-R, plus LEQ. Supports all schedules A, B, C, D, E, Alt A and CIP and spare parts.
Registration Not required. Use the Account Number and PIN.	Registration Required.
Amendment/Changes Amendments must be submitted on hardcopy. Notes to Assessor are recommended.	Amendment/Changes Re-file a complete statement for amendments or changes. The new statement will get a new confirmation number and date/time stamp. Notes to Assessor are recommended.
Prior Year Statements Prior year e-File statements are accessible for viewing and printing.	Prior Year Statements None



Business Personal Property Frequently Asked Questions (FAQs)

V

V. GENERAL BUSINESS PERSONAL PROPERTY FREQUENTLY ASKED QUESTIONS (FAQs)

V(A). GENERAL BUSINESS PERSONAL PROPERTY FAQs

1. When is Business Personal Property appraised?

Unlike real property, business personal property is appraised annually. Owners of all businesses must file a business property statement each year with the Assessor's Office detailing the cost of all their supplies, equipment, and fixtures at each location. This is required unless the Assessor's Office has already established the value of the business property and sent out a notification of "direct billing" or "low value exemption." Business inventory is exempt from taxation. For more information, please email askbpp@sfgov.org.

2. I have a business in San Francisco but did not receive a Business Property Statement, what shall I do?

You are not going to receive a hard copy of the 2018 Form 571-L Business Property Statement. Instead, you will receive one of the following documents: (1) Notice of Requirement to File 2018 Form 571-L Business Property Statement, (2) Notice to e-File 2018 Form 571-L Business Property Statement, (3) Direct Bill Notice, and (4) Low Value Exemption Notice. The Notice that you received is in lieu of a hard copy of the statement. Account Number and PIN are printed on the Notice. Please use them to either

1) e-File Directly Online, or 2) Download, Print, Complete, Sign and Mail your Form 571-L. Each statement downloaded from our website is assigned with a barcode that is specific to each business which is necessary for receiving, processing, and valuation purposes.

If you did not receive the above document(s), please contact our office via email at askbpp@sfgov.org.

3. Why are you taxing my business assets, under what authority?

The State Constitution says that all property is subject to property tax unless otherwise exempt. Most people are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation. Section 201 of the Revenue and Taxation Code of California states that "All property in this State, not exempt under the laws of the United States or of this State, is subject to taxation under this code."

4. What is Business Personal Property?

Business Personal Property is any tangible property owned, claimed, used, possessed, managed or controlled in the conduct of a trade or business. This includes all machinery, fixtures, office furniture and equipment. In general, business personal property is all property owned or leased by a business except licensed vehicles, business inventory, intangible assets or application software.

5. Who must file a Business Property Statement?

Per Revenue and Taxation Code, Section 441, you must file a statement if:

- a) The Assessor's Office has sent you one of the two documents: (1) Notice of Requirement to File 2018 Form 571-L Business Property Statement; and (2) Notice to e-File 2018 Form 571-L Business Property Statement;

OR

- b) You have taxable business property with a total cost of \$100,000 or more, located within the City and County as of January 1st of each year, even if the Assessor's Office did not send, or request you to file a Business Property Statement;

OR

- c) If you have not filed a Form 571-L in past years because you were on Direct Billing (assessed based on existing information in our files), you will receive a notice to file Form 571-L this year because State Law requires a periodic update of Direct Bill accounts. Please file a Form 571-L to reaffirm your business' assessed value has stayed the same, or to reflect changes that have taken place resulting in increases or decreases in value of your business property.

Failure to file the property statement will result in the Assessor's Office estimating the value of your business property and adding a 10% penalty to the assessment (R&T Code, Sections 441, 463 and 501). Additionally, upon discovery, we are required by law to go back and impose the tax on your business, in arrears for 4 years, plus penalties and interests.

6. Why are you taxing my business assets?

The State Constitution states that all property is subject to property tax unless otherwise exempt. Homeowners are familiar with the property taxes on their home. The assets of a business are also subject to assessment and taxation.

7. When is the lien date?

12:01 a.m., January 1st. (R & T 2192)

8. What is the due date for the Business Property Statement?

The due date for filing the Business Property Statement is April 2nd.

9. Is my Form 571-L Business Property Statement and/or Form 571-R Apartment House Property Statement and/or Form 571-STR Short-Term Rental Property Statement confidential?

Yes. By law, the Forms 571-L/R/STR are confidential documents. These are not public document and will be held confidential by the Assessor.

10. What is the last date to file the Business Property Statement without a penalty?

The last day to file the Form 571-L Business Property Statement without a penalty is May 7th (postmarked). Pursuant to California Revenue and Taxation Code Sections 441 (b) & 463, if a business fails to file the Form 571-L Business Property Statement or it is filed late, a 10% penalty will be added to the assessment.

11. I was not open for business on January 1st. Do I still have to complete the statement?

Yes. A business does not have to be opened for its taxable personal property to be subject to assessment. For example, let's presume that on the lien date, January 1st, a new pizza parlor is under construction and nearly ready for its grand opening. Even though the pizza parlor was not open for business on the lien date, taxable business personal property (such as furniture, ovens and supplies) was in the owner's possession on the lien date and the Assessor is required to assess it.

12. I received a Notice from your office, but I went out of business prior to January 1st. Do I still have to complete the statement?

Yes, you need to notify our office the closure of your business by mailing in the completed statement. Please go to the San Francisco County Assessor's e-Filing website, www.sfassessor.org/efile, and click on "File 2018 Statement". Enter Account Number and PIN on Logon page to login. (1) Click "Electronic Filing" on Welcome page and click "Continue with Current Browser" on Questionnaire page. Choose "My Business Closed" option in the middle of the page and submit. Follow the instructions until the end; or (2) Click on the "File by Mail" button (link on "clicking here") on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has closed

and the closing date. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance.

13. I went out of business after the lien date. Do I still have to complete the statement and pay personal property taxes?

Yes. The law specifies that all taxable personal property must be assessed as of a specific point in time, and that point is precisely at 12:01 a.m. January 1st (regardless of what transpires after that date). Even if closed shortly after the lien date (January 1st), a business must still file a Form 571-L Business Property Statement. Please refer to FAQ #10.

14. My business has moved to a new location within San Francisco and “LOCATION” on the Notice I have received shows the old address.

You need to notify our office the movement of your business. Please go to the San Francisco County Assessor’s e-Filing website, www.sfassessor.org/efile, and click on “File 2018 Statement.” Enter Account Number and PIN on Logon page and submit. (1) Click “Electronic Filing” on Welcome page and click “Continue with Current Browser” on Questionnaire page. Choose “My Business Moved to Another Location within San Francisco County” option in the middle of the page and submit. Follow the instructions until the end; or (2) Click on the “File by Mail” button (link on “clicking here”) on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has moved within San Francisco and the moving date. If the moving date was before the lien date (January 1, 2018), upon received of your information, we will close the old account and create a new account number and PIN for new location for you to e-File. If the moving date was after the lien date, you must still complete the form before mailing it in. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the incorrect property despite its true circumstance.

15. My business has moved to a new location outside of San Francisco and “LOCATION” on the Notice I have received shows the old address.

You need to e-File to notify our office the movement of your business. Please go to the San Francisco County Assessor’s e-Filing website, www.sfassessor.org/efile, and click on “File 2018 Statement.” Enter Account Number and PIN on Logon page then submit. (1) Click “Electronic Filing” on Welcome page and click “Continue with Current Browser” on Questionnaire page. Choose “My Business Moved to Another Location Outside San Francisco County” option in the middle of the page and submit. Follow the instructions until the end, or

(2) Click on the “File by Mail” button (link on “clicking here”) on Welcome page and follow the instruction (Section III (A)). Make a notation on the form that the business has

moved outside of San Francisco and the moving date.

If you moved out to another county before January 1st, make a notation on the statement that you have moved outside of the county. Mail the statement to the address indicated on the form and contact the new county to request a Business Property Statement.

If the moving date was after the lien date, you must still complete the form before mailing it in. If this is not done, the Assessor may not be aware of that fact, and may continue to assess the incorrect property despite its true circumstance.

16. I closed or sold my business. Do I still have to file the statement?

Yes, you need to notify our office the movement of your business. Please go to the San Francisco County Assessor's e-Filing website, www.sfassessor.org/efile, and click on "File 2018 Statement". Enter Account Number and PIN on Logon page and submit. (1) Click "Electronic Filing" on Welcome page and click "Continue with Current Browser" on Questionnaire page. Choose "My Business closed/was sold" option(s) in the middle of the page and submit. Follow the instructions until the end; or (2) Click on the "File by Mail" button (link on "clicking here") on Welcome page and follow the instruction (Section III (A)). Please indicate on the statement the status (closed or sold) of your business including the date the status change took place. Please indicate the disposition of the equipment, if closed, or the name of the buyer, if sold, then sign the front page and mail it to the Assessor's Office. Please note that if the sale date was after the lien date, you must still complete the form before mailing it in.

17. Are non-profit organizations required to file Business Property Statements?

Yes, the filing laws apply to non-profit organizations. However, non-profit organizations may qualify for property tax exemptions. For more information, please contact the Exemptions Division of the Assessor's Office. If the ownership name begins with A-I & S, call (415) 554-5658; if ownership name begins with J-R, T-Z call (415) 554-5584.

18. All the equipment I use in my business was given to me and I don't know what to report on my property statement?

Equipment gifted to you for use in your business is taxable and must be reported on the property statement. If you don't know the equipment cost and/or year of acquisition, provide a good description including make and model and the general condition of each piece of equipment.

19. Can I get a copy of my prior year Form 571-L statement?

If you filed your Form 571-L Business Property Statement using e-File last year, you can print copies of your prior year's statement by selecting "View Statement" from the e-File home page and logon with your Account Number and PIN.

To receive a hard copy of your prior year's statement, please go to www.sfassessor.org. In the upper right hand corner at "Search this site" box, type in "Request for Copy," the second item to appear is "Request for Copies of Business Property Documents." Click on that title, click on "Download Form," and follow the instructions. Email this completed form as an attachment to askbpp@sfgov.org or fax to (415) 554-5544 or mail to the Business Personal Property Division, 1155 Market Street, 5th Floor, San Francisco, CA 94103. If you are an agent of a taxpayer, an authorization letter from the business owner is required.

20. How is the assessed value determined?

Assessment begins with the cost of the asset, including sales tax, freight and installation. The Assessor applies a depreciation factor to the asset cost and this becomes the assessed value. The depreciation schedule is based on the expected economic life of the asset, and is different from the depreciation schedule used by tax accountants.

21. If the statement (571-L/571-R/571-STR) is not filed, how is my assessed value determined?

The Assessor's Office, directed by state law, will arbitrarily determine an assessable value. In addition, a 10% penalty for failure to file will be added to your assessment (R&T Code, Sections 441, 463 and 501).

22. I do not own anything and lease all my equipment; do I still have to file the statement?

Yes. You are required to report this information in Part III of the statement so that the Assessor can properly locate and assess the actual owner of the equipment. However, if you own any small equipment, such as printer, copier, supplies, etc., which you are using in the business you need to report these costs under Part II of the statement.

23. Who can sign the statement?

The law requires that the Form 571-L Business Property Statement, Form 571-R Apartment House Property Statement and Form 571-STR Short-Term Rental Property Statement, regardless of where it is executed, shall be declared to be true under the **penalty of perjury** under the laws of the State of California. The Business Property Statement must be signed

by the **business owner**, a duly-appointed fiduciary, or a person authorized on behalf of the owner.

In the case of a **corporation**, the Form 571-L/R/STR must be signed by an officer or by an employee or agent who has been designated in writing by the board of directors, by name or by title, to sign on behalf of the corporation. In the case of **partnership**, the Form 571-L must be signed by a partner or an authorized employee or agent.

In the case of a **Limited Liability Company (LLC)**, the Form 571-L/R/STR must be signed by an LLC manager. If the Form 571-L/R/STR is signed by someone other than a member of the bar, certified public accountant, a public accountant, and enrolled agent or a duly-appointed fiduciary, the San Francisco County Assessor-Recorder's Office requires a written authorization from the owner.

24. I have already completed and sent my Business Property Statement and now realize that I have to amend the statement. What should I do?

You will have to resubmit or file a new statement with all the preprinted identification that was on the initial statement. Please indicate this is an "AMENDED COPY" to the statement that was submitted previously. You may email the Business Division at askbpp@sfgov.org and ask for another statement, if necessary. Statements that were initially filed on time may be amended without penalty until May 31st (R&T Code, Sec. 441 (i)).

25. What is this year's tax rate?

San Francisco's tax rate is determined by the Board of Supervisors. While Proposition 13 established a maximum property tax rate of one percent (1%) of the assessable value, additional tax rate increases may be necessary to pay off indebtedness such as bonds authorized by San Francisco voters. Applying the 2018 tax rate of 1.1723% on the assessed value of the business assets will give a conservative estimate of what the tax owed will be. For example, if the assessed value is \$100,000, the property taxes owed on the business assets will be approximately \$1,172.

26. When will I receive my bill?

If you file your Form 571-L Business Property Statement, Form 571-R Apartment House Property Statement or Form 571-STR Short-Term Rental Property Statement in a timely manner, you should receive your tax bill by the end of June. Payment is due on or before August 31st and becomes delinquent after that date. Delinquent bills will be subject to penalties and interest imposed by the San Francisco Office of the Treasurer & Tax Collector.

If the owner of the business also owns the building in which the business resides, the business property tax will be included with the Secured Property Tax Bill. The secured property tax bill is sent out in October with the first installment due by November 1st.

27. I received my Unsecured Tax bill but don't understand the valuation under Structures/Fixtures?

This line item includes assessments for a combined structural improvements, as well as any fixtures to your property that was reported during this lien year.

28. What is a supply item?

Any items that are used in the normal operation of the business and are not intended for sale or lease on the lien date. Examples of assessable supply items include stationery and office supplies, chemicals, precious metals used to produce a chemical or physical reaction, janitorial and lavatory supplies, fuel, and sandpaper. If you are a manufacturer, supplies do not include anything that becomes part of the finished product. You should report the cost of the supplies on hand, recorded during a physical inventory, as of 12:01 a.m., January 1st. An estimated cost can be used if physical inventory is not available.

29. How do I report disposals?

If you disposed business personal property before 12:01 a.m., January 1st, exclude the original cost of the disposed property from its year of acquisition. For example, in 2017, you reported a \$2,000 computer you acquired in 2006 then sold prior to January 1st, 2018. In this year's filing (2018), you should exclude the \$2,000 cost from the cost reported for the 2006 year of acquisition. Do not report negative costs in 2017 or deduct it from 2017 year of acquisition.

If you disposed leasehold improvement, structure or fixture, you should also exclude the original cost of the disposed improvement from its year of acquisition. In this case, you should also complete the 'Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B' by clicking on the amount under the 'Unreported Change' column under the 'Schedule B Cost Detail.' Information on the disposed improvements should include the disposal date, method of disposal (transfer, scrapped, abandoned, sold, etc.), and name and addresses of the purchasers when items are either sold or transferred.

30. What if I don't agree with the value on my tax bill, can I dispute it?

Yes, you can dispute the tax bill if you don't agree with the value.

The value can be corrected by our office if a clerical or administrative error was made. If this is the case, first contact the Business Personal Property Division of the Assessor's office at askbpp@sfgov.org to inquire a staff member about correcting the error. Our normal business hours are Monday through Friday, 8:00 a.m. to 5:00 p.m. PST.

If the disagreement is a matter of valuation and penalty, you must file an "Application for Changed Assessment" with the San Francisco Assessment Appeals Board (AAB) no later than September 15th for the regular tax bill. The AAB's telephone number is (415) 554-6778. Even if you file an appeal, you must still pay the bill by August 31st to avoid late payment penalties; a refund will be issued if the Assessment Appeals Board rules in your favor.

31. Is there any property that is exempt or that I do not have to report on my Business Property Statement?

The following are some common exempt items that should not be reported:

- Business Inventory (Revenue and Taxation Code 129)
- Application Software (Property Tax Rule 152)
- Licensed Motor Vehicles (R&T Code 10751)
- First \$50,000 of employee-owned Hand Tools (R&T Code 241)

32. Is the Business Property statement subject to audit?

Yes, the Business Property Statement is subject to audit by the Assessor's Office. A new law was enacted and became effective January 1st, 2009. This law basically gives the Assessor the discretion to audit a significant number of all businesses to encourage the accurate and proper reporting of personal property.

33. Have questions? Here are some additional resources to assist businesses in completing the Form 571-L.

- In-person Workshops: to be held at the Business Personal Property Division, 1155 Market Street, 5th Floor, San Francisco, CA 94103
 - Tuesday, March 27th, 2018, 12:00-1:00 p.m.
 - Tuesday, March 27th, 2018, 4:00-5:00 p.m.
- Call our Office at (415) 554-5531 or email askbpp@sfgov.org.

V (B). E-FILE FREQUENTLY ASKED QUESTIONS (FAQS)

1. I would like to e-file this year. Am I eligible to e-file?

Only certain business owners are eligible to use our e-filing portal to file their Form 571-L Business Property Statements. You may participate in e-Filing your statement this year if you received in the mail one of the following documents in the mail: a Notice of Requirement to File 2018 Form 571-L Business Property Statement, a Notice To e-File 2018 Form 571-L Business Property Statement, a Direct Bill Notice, or a Low Value Exemption Notice. If you received one of those notices, your Account Number and PIN are located on the top right corner of your notice and you may use the e-Filing portal to submit your 571-L Business Property Statement.

2. I have my PIN from last year. Can I use it to e-File this year?

No. For security reasons, your business is assigned a new PIN on an annual basis. Use the PIN printed on your 2018 Notice to e-file this year.

3. What are the advantages of e-filing?

- **Accessible:** You can access your current and previous years' e-Filed statements anytime and anywhere there is an internet connection.
- **Accurate:** Fewer mistakes in processing the statement because data is loaded electronically.
- **Convenient:** The ability to e-File 24 hours a day, 7 days a week. You may save your data anytime and complete your e-filing later.
- **Efficient:** Faster than mailing, save on postage, and minimize usage of paper.
- **Reliable:** A confirmation certification indicating the date and time of filing is issued after the return is submitted.
- **Green:** Let's go green together. Use technology, not paper.
- **Confidential:** Only the owner of the Account Number and PIN can view the statement, and it is not a public document.

4. Businesses not eligible to e-File:

- Residential Rental Property (Form 571-R)
- Short-term Rental Property (Form 571-STR)
- Leasing Companies
- Financial Institutions recognized by the State of California
- Insurance Companies recognized by the State of California
- Billboard Companies
- Biotech Companies
- Any business that does not have an email address

5. I logged in with my Account Number and PIN and selected Electronic Filing, but I received an error message. What should I do?

The most common cause for unexpected error messages is due to an unsupported Browser version. Please confirm that you meet the minimum browser requirements:

- Microsoft Internet Explorer, version 7.0 through 10.0; OR
- Mozilla Firefox, version 3.0 or higher
- Adobe PDF Reader

Note: Apple Safari, Google Chrome, Mobile Devices are **NOT** supported at this time.

If you are still receiving an error and are using one of these supported Browsers, please select “File by Mail” (link on “clicking here”) to download, print, complete, sign, and mail the hard copy Form 571-L Business Property Statement.

6. I'm unable to log on successfully. I continue to receive an error message when I enter in my company's Account Number and PIN.

The PIN is case sensitive, so make sure that you are entering a capital “SF” when typing the PIN. Select ‘Submit’ to go to the next page.

7. I forgot my PIN, how do I retrieve it?

To retrieve your PIN, please go to the San Francisco County Assessor's e-Filing website, www.sfassessor.org/efile, and click on “FILE 2018 STATEMENT.” Click “Forgot My Pin” at the bottom of Logon page. Enter your nine-digit account number without dashes, the five digit mailing address zip code and four-digit year for when your business opened.

8. **The e-File screens and printed copy of the Business Property Statement are too large – they are truncated on the right side that I can't see the complete statement.**

Update your Microsoft Explorer view configuration by selecting 'View' on the top toolbar, then 'Text Size,' and select a smaller text size. Alternatively, you may select a different "Zoom" level. To do this, select "View" from your Browser's toolbar, choose "Zoom," and select a smaller zoom level. This can also be done using your Mouse and keyboard, by holding down the CTRL key on your keyboard and using your mouse's scroll-wheel at the same time.

9. **I don't have time to complete the entire form right now. How do I exit the e-file program without completing the final certification step?**

You do not have to complete your form at one time. You may save your data at any time by clicking "Save." To exit the e-File program without completing the final certification step, click "Save" and then click "Log Off" from the top center of the e-File screen. The next time you log in to e-File, you can continue at the last uncompleted step.

10. **Can I attach documents to e-File?**

No, you cannot attach documents to e-File. However, after you have successfully submitted your e-Filed statement, you can mail your attachment with the copy of the "**Certification Complete**" page to our office.

11. **How do I know that the Assessor-Recorder's Office received my rendition?**

A "Certification Complete" page will appear after you click "Submit." This page includes your company name, company number, confirmation number, and date and time of your submission. Please print and keep a copy for your records. If you do not see the confirmation number after submitting, it means that your e-File statement has not been submitted successfully and you should go back and resubmit it.

12. Can I amend my Form 571-L Business Property Statement using e-File? How do I amend e-Filed statement and when is the deadline?

No, you cannot amend a Form 571-L Business Property Statement using e-File once you have already completed 'Step 5: Certification.'

You will need to print a copy of the submitted Form 571-L to make your changes and mail it to the address below:

Office of the Assessor-Recorder
Attn: Business Personal Property Division
1155 Market Street, 5th Floor
San Francisco, CA 94103

Please indicate that it is an AMENDED COPY to the statement that was submitted through e-File. Pursuant to California Revenue and Taxation Code Section 441(i), statements may be amended without penalty until May 31st.

13. I completed my Form 571-L Business Property Statement, but I forgot to print a copy. Can I still print a copy of my Form 571-L statement?

Yes, you can print a copy of your certified Form 571-L statement at any time. At the "Logon" screen, enter your Account Number and PIN. Select "View Statement" from the e-File home page.

14. What is the last date to electronically file the Form 571-L Business Property Statement?

For taxpayers' convenience, the e-File site will allow a taxpayer with privileges to access and file their statements electronically until May 31st (a 10% penalty will be added to the assessment for all statements electronically filed after May 7th). Thereafter, the site will become unavailable for e-Filing statements, and you must file by hard copy (a 10% penalty will be added to the assessment).

15. How can I get a copy of my prior year's Form 571-L Business Property Statement?

If you filed your Form 571-L Business Property Statement using e-File last year, you can print copies of your prior year's statement by selecting "View Statement" from the e-File home page and logon with your Account Number and PIN.

V (C). SHORT-TERM RENTAL PROPERTY FAQs

1. What is the 571-STR form and why did I receive it?

The 571-STR is a State of California tax form required to be completed by rental businesses, including Short-Term Rental businesses. You received this form because as of January 1, 2018, you were a registered business with the City and County of San Francisco, or it became known to our office that you are engaging in property rental activity. Rental of all or a portion of your property, including a residential unit, *means that you are subject to business property tax assessment on furnishings, including furniture, appliances, equipment, and supplies used in the rental activity.* The California Revenue and Taxation Code Section 441(a) requires business owners with personal property of less than \$100,000 in value to file a property statement (i.e., Form 571-STR) upon the Assessor-Recorder's request.

2. Why are you taxing my furnishings in my Short-Term Rental, including my furniture?

Under the State Constitution, all property is subject to property tax unless otherwise exempt. In California, numerous types of property are subject to taxation. The most common property subject to taxation is real property, usually thought of as land and improvements or buildings. A *second type of taxable property is business personal property, which is property used to operate a business, (a short-term rental is considered a registered business), excluding land and improvements. For example, items such as furnishings, includes furniture, kitchen appliances, and washing/drying machines in rentals are considered business personal property.* For more information on the taxation of business property, please go to www.sfassessor.org and click on the button titled "Business Property."

3. I never received this before, why am I receiving this now, and why must I file by May 7th?

Property used in all businesses, including short-term residential rental businesses, is subject to property tax unless an exemption applies. *You received a notice to file a 571-STR form because your taxable business is registered with the City and County of San Francisco. The Form 571-STR is due on April 2. The last day to file without incurring a penalty is May 7, each year; the penalty for filing after May 7, is 10% of the total assessed value.*

4. What do I need to report on the 571-STR form?

You are required to report the cost and acquisition year of all physical assets used in the rental activity. *This includes, but is not limited to, the cost and acquisition year of each piece of furniture, equipment, and supplies used in renting your residence, including furnishings from the kitchen, living room, dining room, and bedroom, such as televisions, computers, bed frames, mattresses, tables, chairs, stoves, fridges, appliances, dish washers, clothes washers and dryers,*

entertainment units, artwork, and any other property that you provide to your renters as part of the rental activity.

5. How is the taxable assessed value determined, including \$7,500 estimated basis used for valuation of a 1 bedroom apartment?

Business property is assessed each year. The assessed value of business property is based on the cost of the asset, which includes but not limited to sales tax, freight and installation. The Assessor-Recorder applies a State Board of Equalization valuation factor to the asset cost to determine the assessed value, while taking into account depreciation. *To establish a uniform assessment baseline citywide, the Assessor-Recorder researched the approximate costs of personal property and furnishings of a typical 1 bedroom apartment in the City and County of San Francisco, and estimated an assessed personal property value of \$7500 for Short-Term Rental taxable furnishings.* The State Board of Equalization provides a valuation schedule based on the expected economic life of different assets that informs the depreciation. For short-term rental business failed to file their Form 571-STR before or on May 7, the baseline value is applied with penalty and necessary adjustments. The assessed value is used to determine the tax due by multiplying the assessed value by the applicable tax rate. For example, the 2018 Business Personal Property tax rate is 1.1723%. If the business personal property assessed value is \$10,000, property taxes on business assets are approximately \$117. The Office of the Treasurer & Tax Collector is responsible for billing and applying the tax rate.

6. I did not buy new furniture for the rental room(s). I used old furniture from my house. How do I report the cost?

Use your best knowledge to estimate the year each item was purchased, and your total cost (including sales tax, freight, and installation).

7. The furniture in the rental room is old. Can I report that it has zero value?

No. You are required to report the original acquisition cost and acquisition year of the assets even if they are old. If you don't know the acquisition cost and year, use your best knowledge to estimate the year each item was purchased, and your total cost (including sales tax, freight, and installation).

8. I only rent out my residence on a part time basis, or sometimes only 1 room of my residence. Do I need to file the 571-STR form?

Yes. You are required to file the 571-STR form if you are engaged in any rental activity. You are also required to report property within the rented room, and any property in other rooms (e.g., bathroom, kitchen, living room, laundry room) that your guests are permitted to use.

9. I registered with the Office of Short-Term Rental and as a business with the Office of the Treasurer-Tax Collector, but I have not rented my residence at all. Do I need to file the 571-STR form?

Yes. As long as either registration was active as of January 1, 2018, you are required to file the 571-STR form.

10. I discontinued my rental business prior to January 1, 2018. Do I need to file the 571-STR form?

You are required to respond to the notice using the 571-STR form to indicate the dates that your rental business was active and the date of closure with your signature and date by the filing deadline. In addition, you must close your business account with the Office of the Treasurer-Tax Collector. Please also notify the Office of Short-Term Rental: (415) 575-9179 or shorttermrentals@sfgov.org.



Contact Information

VI

VI. CONTACT INFORMATION

Please feel free to contact our office using the information below. You may ask for an auditor on duty who will be able to answer your questions.

Address: **Office of the Assessor-Recorder**
Business Personal Property Division
1155 Market Street, 5th Fl.
San Francisco, CA 94103

Telephone: (415) 554-5531

Fax: (415) 554-5544

Email: askbpp@sfgov.org

Hours: Monday thru Friday
8:00 A.M. to 5:00 P.M.
Excluding legal holidays



Appendix

VII

VII. APPENDIX

Form 571-L Business Property Statement

Form 571-D Supplemental Schedule

Form 571-L Alternate Schedule A (for Bank, Insurance Company, or Financial Corporation Fixtures)

Form 571-R Apartment House Property Statement

Form 571-STR Short-Term Rental Property Statement

Request for Address and Other Changes Form

Request for Copies of Property Statements (Form 571-L) and Other Documents Form

FORM 571-L BUSINESS PROPERTY STATEMENT

F O R M	571-L	CARMEN CHU, ASSESSOR-RECORDER BUSINESS PROPERTY STATEMENT CITY & COUNTY OF SAN FRANCISCO <small>1155 Market St., 5th Floor, San Francisco, CA 94103 • askbpp@sfgov.org • www.sfassessor.org</small>	2018																																
RETURN THIS ORIGINAL FORM. COPIES WILL NOT BE ACCEPTED. FILE RETURN BY APRIL 2, 2018		DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION AS OF 12:01 A.M., JANUARY 1, 2018																																	
ACCOUNT NUMBER	LA BY	LOCATION OF RECORDS	ROLL CODE	ROUTING	VOL BLK LOT																														
NAME AND MAILING ADDRESS <i>(Make necessary corrections to the printed name and mailing address)</i>																																			
LOCATION OF THE BUSINESS PROPERTY <i>(File a separate statement for each location)</i>																																			
PART I: GENERAL INFORMATION																																			
COMPLETE (a) THRU (g) a. Enter type of business: _____ b. Enter local telephone number () _____ FAX number () _____ E-Mail Address _____ c. Do you own the land at this business location? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, is the name on your deed recorded as shown on this statement? <input type="checkbox"/> Yes <input type="checkbox"/> No d. When did you start business at this location? DATE: _____ If your business name or location has changed from last year, enter the former name and/or location: _____ e. Enter location of general ledger and all related accounting records (include zip code): _____ f. Enter name and telephone number of authorized person to contact at location of accounting records: _____ g. During the period of January 1, 2017 through December 31, 2017 (1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "control" interest (see instructions for definition) in this business property? <input type="checkbox"/> Yes <input type="checkbox"/> No (2) If YES, did this business entity also own "real property" (see instructions for definition) in California at time of acquisition? <input type="checkbox"/> Yes <input type="checkbox"/> No IF YES to either questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.																																			
PART II: DECLARATION OF PROPERTY BELONGING TO YOU <i>(attach schedule for any adjustment to cost)</i>				ASSESSOR'S USE ONLY																															
1. Supplies _____ 2. Equipment _____ 3. Equipment out on lease, rent, or conditional sale to other _____ 4. Bldgs., Bldg. Impr., and/or Leasehold Impr., Land Impr., Land _____ 5. Construction in Progress _____ 6. Alternate Schedule A _____ 7. _____ 8. _____				(only costs) (see instructions)																															
PART III: DECLARATION OF PROPERTY BELONGING TO OTHERS - IF NONE WRITE "NONE"																																			
Report conditional sales contracts that are not leases on Schedule A (SPECIFY TYPE BY CODE NUMBER) 1. Leased equipment 2. Lease-purchase option equipment 3. Capitalized leased equipment 4. Vending equipment 5. Other businesses 6. Government-owned property Tax Obligation: A. Lessor B. Lessee 9. Lessor's name _____ Mailing address _____ 10. Lessor's name _____ Mailing address _____																																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Year Of Acq.</th> <th>Year Of Mfr.</th> <th>Description and Lease or Identification Number</th> <th>Cost to Purchase New</th> <th>Annual Rent</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>						Year Of Acq.	Year Of Mfr.	Description and Lease or Identification Number	Cost to Purchase New	Annual Rent																									
Year Of Acq.	Year Of Mfr.	Description and Lease or Identification Number	Cost to Purchase New	Annual Rent																															
OWNERSHIP TYPE (✓)																																			
Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Other <input type="checkbox"/>																																			
NOTE: The following declaration must be completed and signed. If you do not do so, it may result in penalties. I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2018.																																			
SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT*					DATE																														
NAME OF ASSESSEE OR AUTHORIZED AGENT* (typed or printed)					TITLE																														
NAME OF LEGAL ENTITY (other than DBA) (typed or printed)					FEDERAL EMPLOYER ID NUMBER																														
PREPARER'S NAME AND ADDRESS (typed or printed)					TITLE																														
TELEPHONE NUMBER ()																																			
BUSINESS DESCRIPTION (✓) Retail <input type="checkbox"/> Wholesale <input type="checkbox"/> Manufacturer <input type="checkbox"/> Service/Professional <input type="checkbox"/>																																			
*Agent: See Declaration by Assessee instructions. THIS STATEMENT SUBJECT TO AUDIT INFORMATION PROVIDED ON A PROPERTY STATEMENT MAY BE SHARED WITH THE STATE BOARD OF EQUALIZATION																																			

SCHEDULE A — COST DETAIL: EQUIPMENT (Do not include property reported in Part III.)

Include expensed equipment and fully depreciated items. Include sales or use tax (see instructions for important use tax information), freight and installation costs. Attach schedules as needed. Lines 18, 32, 33, and 45 "Prior" — Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	1. MACHINERY AND EQUIPMENT FOR INDUSTRY, PROFESSION, OR TRADE (do not include licensed vehicles)				2. OFFICE FURNITURE AND EQUIPMENT		3. OTHER EQUIPMENT (describe)		Calendar Year of Acq.	4. TOOLS, MOLDS, DIES, JIGS	
		COST	ASSESSOR'S USE ONLY			COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY		COST	ASSESSOR'S USE ONLY
11	2017									2017		
12	2016									2016		
13	2015									2015		
14	2014									2014		
15	2013									2013		
16	2012									2012		
17	2011									2011		
18	2010									Prior		
19	2009									Total		
20	2008											
21	2007									5a. PERSONAL COMPUTERS		
22	2006									COST	ASSESSOR'S USE ONLY	
23	2005									2017		
24	2004									2016		
25	2003									2015		
26	2002									2014		
27	2001									2013		
28	2000									2012		
29	1999									2011		
30	1998									2010		
31	1997									2009		
32	1996									Prior		
33	Prior									Total		
34	Total											
35	Add TOTALS on lines 19, 33, 34, 46 and any additional schedules. ENTER HERE AND ON PART II, LINE 2									5b. LOCAL AREA NETWORK (LAN) EQUIPMENT AND MAINFRAMES		
36	ASSESSOR'S USE ONLY									COST	ASSESSOR'S USE ONLY	
37	CLASSIFICATION	COL	FULL VALUE BASE	FULL VALUE	PERS. PROP. RCLND	PERS. PROP. ADJUSTMENT	PERS. PROP. FULL VALUE			2017		
38	Machinery & equipment	1								2016		
39	Office furniture & equipment	2								2015		
40	Tools, molds, dies & jigs	4								2014		
41	Personal Computers	5a								2013		
42	LAN and Mainframe	5b								2012		
43										2011		
44	Other equipment	3								2010		
45	Schedule B — Fixtures	—								2009		
46	TOTALS									Prior		
										Total		

SCHEDULE B — COST DETAIL: BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS, LAND IMPROVEMENTS, LAND AND LAND DEVELOPMENT

Attach schedules as needed. Line 69 "Prior"— Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS				3. LAND IMPROVEMENTS (e.g., blacktop, curbs, fences)		4. LAND AND LAND DEVELOPMENT (e.g., fill, grading)	
		1. STRUCTURE ITEMS ONLY (see instructions)		2. FIXTURES ONLY (see instructions)		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY
		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY				
47	2017								
48	2016								
49	2015								
50	2014								
51	2013								
52	2012								
53	2011								
54	2010								
55	2009								
56	2008								
57	2007								
58	2006								
59	2005								
60	2004								
61	2003								
62	2002								
63	2001								
64	2000								
65	1999								
66	1998								
67	1997								
68	1996								
69	Prior								
70	Total								
71	Add TOTALS on line 70 and any additional schedules. ENTER HERE AND ON PART II, LINE 4								
72	Have you received allowances for tenant improvements for the current reporting period that are not reported above? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes indicate amount \$								

REMARKS:

[illegible]

[illegible]

REMARKS:

FORM 571-L ALTERNATE SCHEDULE A

For Bank, Insurance Company, or Financial Corporation Fixtures

BOE-571-LA (P1) REV. 21 (06-17)

ALTERNATE SCHEDULE A FOR BANK, INSURANCE COMPANY, OR FINANCIAL CORPORATION FIXTURES

Name _____ Location _____ Corporation No. _____

Include expensed equipment and fully depreciated items. Include sales or use tax, freight and installation costs. Attach schedules as needed. Line 95 "Prior" — Report detail by year(s) of acquisition on a separate schedule.

LINE NO	Calendar Year of Acq.	1. COUNTERLINES, PARTITIONS, CAFETERIA EQUIPMENT, ETC.		2. SIGNS, CAMERAS, TV EQUIPMENT, ETC.		Enter Code (C) or (DR)	3. CARPETS (C), DRAPES (DR)		4. ATMs (Do not include free standing or counter-top units)	
		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY		COST	ASSESSOR'S USE ONLY	COST	ASSESSOR'S USE ONLY
73	2017									
74	2016									
75	2015									
76	2014									
77	2013									
78	2012									
79	2011									
80	2010									
81	2009									
82	2008									
83	2007									
84	2006									
85	2005									
86	2004									
87	2003									
88	2002									
89	2001									
90	2000									
91	1999									
92	1998									
93	1997									
94	1996									
95	Prior									
96	Total									
97	Add TOTALS on lines 96, 103, and any additional schedules. ENTER HERE AND ON (P1), PART II, LINE 6									

LINE NO	Enter Year of Acq.	Enter Code (V) or (N)	5. VAULT DOORS (V) AND NIGHT DEPOSITORIES (N)		Enter Year of Acq.	Enter Code (D) (W) or (K)	6. DRIVE-UP WINDOWS (D) WALK-UP WINDOWS (W) AND KIOSKS (K)		ASSESSOR'S USE ONLY		
			COST	ASSESSOR'S USE ONLY			COST	ASSESSOR'S USE ONLY	CLASSIFICATION	MARKET VALUE	ADJUSTED BASE YEAR VALUE
98									Counterlines, etc.		
99									Camera, etc.		
100									Carpets, drapes		
101									ATMs		
102									Vault doors, etc.		
103									Kiosks, etc.		
103	TOTAL				TOTAL				TOTALS		

REMARKS: _____

THIS STATEMENT SUBJECT TO AUDIT

**INSTRUCTIONS FOR COMPLETING ALTERNATE SCHEDULE A FOR BANK, INSURANCE COMPANY,
OR FINANCIAL CORPORATION FIXTURES**

This schedule is applicable **ONLY** to: (1) banks and financial corporations that are subject to taxation under the provisions of section 23181 et seq. of the Revenue and Taxation Code; and (2) insurance companies that are subject to taxation under the provisions of section 28 of Article XIII of the California Constitution. If the assessee named on this statement is not a bank, financial corporation, or insurance company as defined in the preceding sentence, so indicate in the "Remarks" section and **do not** complete this schedule. Complete BOE-571-L, *Business Property Statement*, and return it and this schedule to the Assessor.

If the assessee named on this statement is a bank, financial corporation, or insurance company as defined above, complete entire BOE-571-L, **except do not complete Schedule A or Column 2 of Schedule B of that statement**. This supplemental schedule must be completed in lieu of Schedule A and Column 2 of Schedule B and submitted with BOE-571-L.

NAME and LOCATION. Enter the OWNER NAME and LOCATION OF THE PROPERTY as indicated on the front of BOE-571-L.

CORPORATION NUMBER. Enter the corporate number issued by the California Secretary of State. If this number has not been issued, enter the equivalent number issued by the Franchise Tax Board.

FIXTURES. Under the California law, personal property owned by a bank or financial corporation, and personal property owned by an insurance company, are exempt from property tax assessment. However, fixtures are taxable and must be reported on this schedule. Report the cost of your fixtures by calendar year of acquisition in the column that best describes the fixtures. Total the reported costs and enter the total on (P1), line 6, of BOE-571-L.

Do not include building costs which are reported in Column 1 of Schedule B of BOE-571-L.

To facilitate your reporting, below is a list of typical fixtures. Note that some items may be capitalized as personal property on your records, but must be reported as fixtures on this schedule. If additional information is needed, please contact the Assessor's Office cited on the face of BOE-571-L.

COLUMNS 3, 5, and 6. Report separately each item's cost, year of acquisition, and descriptive code ("C" for Carpets, "DR" for Drapes, "V" for Vault Door, "N" for Night Deposit, "D" for Drive-up Window, "W" for Walk-up Window, and "K" for Kiosk.) If carpets and drapes were acquired in the same year, please attach a separate schedule listing the year of acquisition and the individual costs.

COLUMN 4. ATMs that are installed as free standing or counter-top units within a building are classified as personal property. ATMs installed in a structure built primarily for the purpose of housing the ATMs, or an ATM installed through the wall of a building, is classified as a fixture. (See Property Tax Rule 122.5(e)(9) and Assessor's Handbook Section 504, page 18.)

REFERENCE LIST

LIST OF TYPICAL FIXTURES TO BE REPORTED IN COLUMN 1

Auditorium equipment (seating-stage and lighting-sound-projection)
Conveyors
Counters (include teller lines and railings)
Interior railings (not safety railings-staircase or mezzanine)
Man traps
Permanently attached partitions (less than ceiling heights)
Power panels, plumbing, and wiring for computers
Restaurant and cafeteria equipment including plumbing
Safe-deposit booths (partitions)
Shelving (attached or built-in)
Vault alarm systems
Vault ventilator
Wall-hung desks and built-in desks

LIST OF TYPICAL FIXTURES TO BE REPORTED IN COLUMN 2

Auxiliary or standby power generation equipment and ride through generators
Burglar alarms
Cameras (surveillance) attached to walls or columns
Closed circuit television systems
Electronic security or surveillance equipment
Music and security paging systems
Signs
Standby air conditioning for computers
Telephone systems equipment if permanently annexed to real property
Trash compactors and paper shredders
Vacuum air tube systems and compressors

FORM 571-R APARTMENT HOUSE PROPERTY STATEMENT

FORM 571-R

CARMEN CHU, ASSESSOR-RECORDER
APARTMENT HOUSE PROPERTY STATEMENT
CITY & COUNTY OF SAN FRANCISCO

2018

1155 Market St., 5th Floor, San Francisco, CA 94103 • eskbop@sfgo.org • www.sfassessor.org

RETURN THIS ORIGINAL FORM.
COPIES WILL NOT BE ACCEPTED.
FILE RETURN BY APRIL 2, 2018

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION
AS OF 12:01 A.M., JANUARY 1, 2018

ACCOUNT NUMBER	LA BY	BLK LOT
----------------	-------	---------

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)

Local Telephone Number () Fax Number ()

E-Mail Address

Enter location of general ledger and all related accounting records (include zip code):

STREET	CITY	STATE	ZIP
--------	------	-------	-----

Enter name and telephone number of authorized person to contact at location of accounting records:

CAREFULLY READ AND FOLLOW THE ACCOMPANYING INSTRUCTIONS.

1. If you no longer own this property as of January 1 of this year, show the name and address of the previous owner:

Name

Mailing Address

City and State

2. Enter the total number of units for the location listed.

Do you live in one of the units?
☐ Yes ☐ No

If yes, enter the unit number

During the period of January 1, 2017 through December 31, 2017:

(1) Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity?
☐ Yes ☐ No

(2) If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of acquisition?
☐ Yes ☐ No

(3) If YES to both questions (1) and (2), filer must submit form BOE-100-B, Statement of Change in Control and Ownership of Legal Entities, to the State Board of Equalization. See instructions for filing requirements.

4. Do any other individuals, partnerships or corporations do business or own personal property (other than household furniture and personal effects of your tenants) located on your premises? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list below.							ASSESSOR'S USE ONLY
NAME AND ADDRESS OF OWNER OF SUCH PROPERTY				NATURE OF THE BUSINESS OR PROPERTY			
5. Do you hold furniture or equipment belonging to others on a loan, rental, or lease basis? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list below.							FXT PPT
NAME AND ADDRESS OF OWNER OF SUCH PROPERTY				QUANTITY AND DESCRIPTION			
6. ENTER BELOW the number of fully furnished, partly furnished (e.g., stoves and refrigerators, not built-in), and unfurnished units. Also complete Schedule A of the back. Do not include, either here or in Schedule A, any unit in which you live.							
	SLP. ROOM	STUDIO	1 BEDRM.	2 BEDRM.	3 BEDRM.	LARGER	
FULLY FURNISHED							
PARTLY FURNISHED							
UNFURNISHED							
TOTALS							
7. Supplies							Cost \$
8. Furniture and appliances							Enter From Schedule A \$
9. Other furniture and equipment							Enter From Schedule B \$
10.							
						TOTAL FULL VALUE	
						PERSONAL PROPERTY	
						FIXTURES	
						OTHER IMPROVEMENTS	
						LAND	

THIS STATEMENT SUBJECT TO AUDIT

SCHEDULES OF DEPRECIABLE PROPERTY-SCHEDULES A and B. Items may be listed separately within the year of acquisition on a separate schedule, or items may be grouped by year of acquisition and listed on the schedules below. If you purchased the property as a unit, report on Schedule A & B the previous owner's original cost by the original year of acquisition of the furniture and equipment that was included in your purchase.

Enter the total installed cost including freight, excise taxes, and sales and use taxes of all furniture, and other equipment located on the premises. Include fully depreciated items. Do not include licensed vehicles. Depreciation schedules may be attached if they provide the desired information.

SCHEDULE A				SCHEDULE B			
FURNITURE AND APPLIANCES (include items in storage; do not include built-ins)				OTHER FURNITURE AND EQUIPMENT (office, lobby, laundry, pool, vending, signs, fire extinguishers)			
Year of Acquisition	Original Installed Cost (NOT depreciated book value)	FOR ASSESSOR'S USE ONLY		Year of Acquisition	Original Installed Cost (NOT depreciated book value)	FOR ASSESSOR'S USE ONLY	
		Factor	Value			Factor	Value
2017				2017			
2016				2016			
2015				2015			
2014				2014			
2013				2013			
2012				2012			
2011				2011			
2010				2010			
2009				2009			
2008				2008			
2007 & prior				2007			
TOTAL COST \$ _____ Enter on line 8, page 1.				TOTAL COST \$ _____ Enter on line 9, page 1.			

REMARKS:

DECLARATION BY ASSESSEE

Note: The following declaration must be completed and signed. If you do not do so, it may result in penalties.

I declare under penalty of perjury under the laws of the State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the assessee in this statement at 12:01 a.m. on January 1, 2018.

OWNERSHIP TYPE (✓)	SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT*		DATE
	NAME OF ASSESSEE OR AUTHORIZED AGENT* (typed or printed)		TITLE
	NAME OF LEGAL ENTITY (other than DBA)(typed or printed)		FEDERAL EMPLOYER ID NUMBER
	PREPARER'S NAME AND ADDRESS (typed or printed)		TELEPHONE NO. ()

*Agent: See page 3 for Declaration by Assessee instructions.

FORM 571-STR SHORT-TERM RENTAL PROPERTY STATEMENT

FORM 571-STR

**CARMEN CHU, ASSESSOR-RECORDER
SHORT TERM RENTAL PROPERTY STATEMENT
CITY & COUNTY OF SAN FRANCISCO**

1155 Market St., 5th Floor, San Francisco, CA 94103 • askbop@sfgov.org • www.sfassessor.org

2018

RETURN THIS ORIGINAL FORM.
COPIES WILL NOT BE ACCEPTED.
FILE RETURN BY APRIL 2, 2018

DECLARATION OF COSTS AND OTHER RELATED PROPERTY INFORMATION
AS OF 12:01 A.M., JANUARY 1, 2018

ASSESSOR'S USE ONLY ACCOUNT NUMBER	ASSESSOR'S USE ONLY ROLL	ASSESSOR'S USE ONLY APN
---------------------------------------	-----------------------------	----------------------------

NAME AND MAILING ADDRESS
(Make necessary corrections to the printed name and mailing address.)



LOCATION ADDRESS OF THE PROPERTY (street, city)
(Separate statement for each location)

PART 1: GENERAL INFORMATION

Local Telephone Number () _____ Fax Number () _____
E-Mail Address _____
Enter location of general ledger and all related accounting records (include zip code):
STREET _____ CITY _____ STATE _____ ZIP _____

PART 2: PROPERTY

- 3a. Do you own the land used at this short term rental property location? ☐ Yes ☐ No
If Yes, is the name on your deed recorded as shown on this statement? ☐ Yes ☐ No
3b. Do you own the personal property (e.g., household furniture and personal effects) located at your short term rental property location?
☐ Yes ☐ No If NO, list below NAME AND ADDRESS OF OWNER AND DESCRIPTION OF SUCH PROPERTY

PART 3: DECLARATION OF PERSONAL PROPERTY BELONGING TO YOU [use Schedule A on page 2 to complete totals below.]

4. Supplies	Enter cost estimate of supplies consumed by rental guests	\$
5. Furniture & belongings	Enter total costs from page 2	\$
6. Kitchen Appliances	Enter total costs from page 2	\$
7. Other equipment	Enter total costs from page 2	\$
TOTAL PERSONAL PROPERTY		\$

ASSESSOR'S USE ONLY

Sign here

I declare under penalty of perjury under the laws of State of California that I have examined this property statement, including accompanying schedules, statements or other attachments, and to the best of my knowledge and belief it is true, correct, and complete and includes all property required to be reported which is owned, claimed, possessed, controlled, or managed by the person named as the Assessee in this statement at 12:01 a.m. on January 1, 2018.

OWNER SIGNATURE OF ASSESSEE OR AUTHORIZED AGENT	DATE
NAME OF ASSESSEE OR AUTHORIZED AGENT (typed or printed)	DATE
PREPARER'S NAME AND ADDRESS (typed or printed)	DATE

THIS STATEMENT SUBJECT TO AUDIT

SCHEDULE A - COST DETAIL: FURNITURE & EQUIPMENT**Table to itemize belongings**

Section 1(a) of article XIII of the California Constitution provides that all property is taxable unless otherwise exempted. Therefore, all home furnishings that are used in a short term rental property - including dishware, sofas, mattresses and bedding - are subject to personal property taxes.

One by one, please list EACH ITEM per room contained in the short term rental property and estimate cost and year that items were acquired.
For assistance, refer to Short Term Rental - Frequently Asked Questions at <http://www.sfassessor.org> or e-mail us at askbhp@sfgov.org or call us at 415.554.5531

Year acquired	Bedroom #1 furniture & belongings	Original cost	Year acquired	Living area furniture & belongings	Original cost	Year acquired	Kitchen appliances	Original cost
	Mattress			Sofa			Dishwasher	
	Box Spring			Chairs			Refrigerator	
	Bedframe			Rug			Stove	
	Pillows and bedding			TV			Microwave	
	Duvet cover / blanket			Table			Toaster	
	Bureau / chest of drawers			Storage chest of drawers			Coffee maker	
	Rug			Table lamp			Blender	
	Mirror			Floor lamp			Ice maker	
	Table lamp			Mirror			Other	
	Floor lamp			Artwork: painting/picture				
	Artwork: painting/picture			Clocks				
	TV			Other				
	Other							
	Total			Total			Total	
Year acquired	Bedroom #2 furniture & belongings	Original cost	Year acquired	Dining & kitchen furniture & belongings	Original cost	Year acquired	Other equipment	Original cost
	Mattress			Dishwasher			Clothes washer	
	Box Spring			Refrigerator			Clothes dryer	
	Bedframe			Stove			Vacuum cleaner	
	Pillows and bedding			Pots and pans			Computers	
	Duvet cover / blanket			Table			Bikes	
	Bureau / chest of drawers			Chairs			Sports equipment	
	Rug			Rug			Security systems	
	Mirror			Table lamp			Outdoor playground	
	Table lamp			Floor lamp			Patio furniture	
	Floor lamp			Mirror			Gazebo	
	Artwork: painting/picture			Artwork: painting/picture			Portable hot tub	
	TV			Clocks			Pool equipment	
	Other			Other			Other	
	Total			Total			Total	
Year acquired	Bedroom #3 furniture & belongings	Original cost	Year acquired	Bathroom furniture & belongings	Original cost	<p>Add up TOTAL COSTS for FURNITURE & BELONGINGS as listed in both the left and center columns and carry forward the total sum to the front page, line 5.</p> <p>Add up TOTAL COSTS for Appliances as listed in the upper right column and carry forward the total sum to the front page, line 6.</p> <p>Add up TOTAL COSTS for Equipment as listed in the mid right column and carry forward the total sum to the front page, line 7.</p>		
	Mattress			Bath towels				
	Box Spring			Hand towels				
	Bedframe			Other				
	Pillows and bedding							
	Duvet cover / blanket							
	Bureau / chest of drawers							
	Rug							
	Mirror							
	Table lamp							
	Floor lamp							
	Artwork: painting/picture							
	TV							
	Other							
	Total			Total				

REQUEST FOR ADDRESS AND OTHER CHANGES FORM

CARMEN CHU
ASSESSOR-RECORDER



SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

Request for Business Account Update

Instructions: Complete and return this Form to the Office of the Assessor-Recorder to report changes to your business.

Business Information

Assessor's Account Number: _____ Today's Date: _____

Owner's Legal Name: _____
(Corporations must report their full corporate name.)

Business Name (DBA): _____

Business Account Number (BAN): _____
(From your business certificate provided by the Office of the Treasurer & Tax Collector.)

Business Account Update Information

Please check the appropriate box(es) below and provide the previous and new business information.

☐ **Change in Ownership**

Effective Date: _____

Previous Owner's Legal Name: _____

New Owner's Legal Name: _____

From: ☐ Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Other: _____

To: ☐ Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Other: _____

Did your federal employer identification number change? ☐ Yes ☐ No

☐ **Business Name (DBA) Change**

Effective Date: _____

Previous Name: _____ New Name: _____

☐ **Business Location Change**

Effective Date: _____

Previous Location: _____

New Location: _____

☐ **Mailing Address Change**

Effective Date: _____

Previous Address: _____

New Address: _____

Contact Information

Contact Name: _____ Title: _____

Phone Number: _____ Email Address: _____

I CERTIFY UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING AND ALL INFORMATION HEREON, INCLUDING ANY ACCOMPANYING STATEMENTS OR DOCUMENTS IS TRUE, CORRECT, AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF.

Signature

Printed Name

Date Signed

Business Personal Property: 1155 Market Street, 5th Floor
San Francisco, CA 94103
Tel: (415) 554-5531 Fax: (415) 554-5544
www.sfassessor.org
e-mail: askbpp@sfgov.org

REQUEST FOR COPIES OF PROPERTY STATEMENTS (FORM 571-L) AND OTHER DOCUMENTS FORM

CARMEN CHU
ASSESSOR-RECORDER



SAN FRANCISCO
OFFICE OF THE ASSESSOR-RECORDER

Request for Copies of Property Statements (571-L) and Other Documents

Instructions: The Assessor's records are confidential in nature and requests require verification of the authorized signature. Therefore, please fill out this Form and include your account number, the owner's legal name, the DBA name, the mailing address, and the location of the property. Return this Form to the address, email, or fax number listed at the bottom of this Form. If you are an agent of a taxpayer, an authorization letter from the business owner is required to be submitted with this Form.

Business Information

Assessor's Account Number: _____ Business Account Number (BAN)*: _____
Owner's Legal Name: _____
(Corporations must report their full corporate name.)
Business Name (DBA): _____
Business Location: _____
Mailing Address: _____

Documents Requested

Please check the appropriate box(es) below to request documents:

- ☐ Copy of **current year** Business Property Statement (Form 571-L) for filing purposes.
☐ Copy of **prior year** Business Property Statement (Form 571-L) and valuation breakdown for years (please list):

- ☐ Copies of audit work papers for years (please list) : _____
☐ Other documents, please specify: _____

Remarks: _____

Requestor Information

Requested By: _____ Title: _____
Phone Number: _____ Email Address: _____

I CERTIFY UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING AND ALL INFORMATION HEREON, INCLUDING ANY ACCOMPANYING STATEMENTS OR DOCUMENTS IS TRUE, CORRECT, AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF.

Signature Printed Name Date Signed

**From your business certificate provided by the Office of the Treasurer & Tax Collector.*

Business Personal Property: 1155 Market Street, 5th Floor
San Francisco, CA 94103
Tel: (415) 554-5531 Fax: (415) 554-5544
www.sfassessor.org
e-mail: askbpp@sfgov.org