CARMEN CHU ASSESSOR-RECORDER

SAN FRANCISCO OFFICE OF THE ASSESSOR-RECORDER

Form 571-L Business Property Statement Manual

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CONTENTS

I. Overview for Filing a Business Property Statement	2
II. Filing a Form 571-L Electronically (e-File)	6
II (A). E-File User's Guide (Instructions for Electronic Filing)	8
II (B). Business Moved/Closed/Sold	
II (BI). Business moved to another location within san francisco county	45
II (BII). Business moved to another location outside San Francisco County	
II (BIII). Business closed	53
II (BIV). Business sold	57
III. Filing a Form 571-L Paper Document	60
III (A). File by Mail User's Guide (Download, Print, Complete, Sign & Mail)	60
III (B). Instructions for Filing the Form 571-L	
IV. Filing Through the Standard Data Record (SDR) System	73
IV (A). E-File and SDR Capabilities Overview	74
V. General Business Personal Property Frequently Asked Questions (FAQs)	75
V (A). E-File Frequently Asked Questions (FAQs)	
VI. Contact Information	88
VII. Appendix	89
Form 571-L Business Property Statement	
Form 571-D Supplemental Schedule	97
Form 571-L Alternate Schedule A	
Form 571-R Apartment House Property Statement	
New Business Registration Form	
Request for Address and Other Changes Form	
Request for Copies of Property Statements (Form 571-L) and Other Documents Form	



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), (III) Filing a Form 571-L Paper Document, (IV) Filing through the Standard Data Record (SDR) System, (V) General Business Personal Property Frequently Asked Questions (FAQs), (VI) Contact Information, and (VII) 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 2016 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 2016 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 2016 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, 2016, then you would report all personal property in your possession as of December 31st, 2015.

Why am I getting a Notice of Requirement to File 2016 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 2016 Form 571-L and you are required by law to respond.

When are the filing deadlines?

All property statements are due April 1st annually. The statements are accepted as timely filed until May 7th at 5:00 p.m. When mailed through the post office the forms are required to be postmarked May 7th. If May 7th falls on a Saturday, Sunday, or legal holiday, a property statement that is mailed and postmarked on the next business day shall be deemed to have been filed on 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 3885, 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's Office.



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 2016 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 (<u>www.sfassessor.org/efile</u>) will begin accepting online statements beginning **Tuesday, February 16th, 2016**. 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, 2016, and is non-transferable. If you have multiple business locations, but only received notices to file in some of the locations, please call our office at (415) 554-5531 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 2016 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 the two-digit month and four-digit year for when your business opened.

You may also send a written request, on company's letterhead with an authorized signature. Please 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 <u>askbpp@sfgov.org</u>.

Your 2016 Business Property Statement is due by April 1st, 2016. The last day to e-File without incurring a penalty is May 9th, 2016. 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. *Additionally, some of the screens included are for 2015, but no changes have been made to those screens for the 2016 tax year.*

In February 2016, you received one of the following four Notices: (1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, (2) Notice to e-File 2016 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.

I. **FILE 2016 STATEMENT** - Go to the San Francisco County Assessor's e-Filing website, <u>http://www.sfassessor.org/efile</u>, and click on "<u>FILE 2016 STATEMENT</u>" (Fig. 1).

		Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org Home 571-L Instructions Help
571-L Business F	Property Statement - 2	2016
	We Your business has b Statement. There au 1) E-File Directly On	Icome to the County Assessor's e-File System! een pre-selected for online filing of your 2016 Form 571-L Business Property re two ways in which you can file your statement: line. or
	2) Download, Print,	Complete, Sign and Mail.
	Click "FILE 2016 ST	ATEMENT" to begin.
		» FILE 2016 STATEMENT
	IMPORTANT DATES	TO REMEMBER :
	April 1 -	Due Date for Form 571-L Business Property Statement.
	• May 7 .	Last Day to File May 7, 2016 falls on a Saturday. Therefore, any property statement that is postmarked on the next business day (Monday, May 9) will be considered timely. Any statements postmarked after May 9 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.
		VIEW STATEMENT
	IMPORTANT BROWS If you are usin If you are usin Note: Apple S Download lat Download lat Adobe PDF Rea	SER REQUIREMENTS: Ing Internet Explorer, we support versions 7.0 through 10 Ing Mozilla FireFox, the minimum requirement is version 3.0 afari, Google Chrome, or Mobile Devices are NOT supported at this time. est supported version of Internet Explorer. <u>Click here</u> est version of Mozilla FireFox. <u>Click here</u> ider is required if you want to view the 571-L Instructions or Paper Filing form.
Copyright Lin	ks FAQ Assesso	pr

II. **LOG ON** - Enter the Account Number and PIN provided on the Notice, and then click "Submit." Do not use dashes or spaces when entering the Account Number. Note that the PIN is case sensitive. (Fig. 2)

	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbp@sfgov.org
	Home 571-L Instructions Help
571-L Business F	Property Statement - 2016
A THE COUNTY OF	Logon
	Please enter the nine-digit business Account # as it appears on the: 1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, or (2) Notice to e-File 2016 Form 571-L Business Property Statement, or (3) Direct Bill Notice, or (4) Low Value Exemption Notice. Then, enter the PIN#. Please note that the PIN # is case sensitive. For assistance click on "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.)
	Submit Reset Forgot My Pin
Copyright Lin	ks FAQ Assessor

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 the two-digit month and four-digit year for when your business opened (Fig. 2.1).

					Carmen Chu
					Assessor-Recorder
				115	55 Market Street, 5th Floor
					San Francisco, CA 94103 (A15) 554-553
					askbpp@sfoov.org
				Home 571-L Ins	structions Help
571-L Business Pro	perty Statement	t - 2016			
То Ба	retrieve your Pl	For N, please enter your nin	got My PIN e-digit accour	nt number without	dashes, the
yo	e-digit mailing a ur business ope	ddress zip code, and th ned.	e two-digit mo	onth and four-digit	year for when
yo	e-digit mailing a ur business ope	ddress zip code, and th ned. Account Number:	e two-digit mo	onth and four-digit (No spaces or dashes)	year for when
yo	e-digit mailing a ur business ope I	eddress zip code, and the ened. Account Number: Mailing Address Zip Code:	e two-digit mo	onth and four-digit (No spaces or dashes)	year for when
yo	e-digit mailing a ur business ope I	eddress zip code, and the ened. Account Number: Mailing Address Zip Code: Date your business opened:	e two-digit mo	(No spaces or dashes)	year for when
yo	e-digit mailing a ur business ope	Account Number: Account Number: Mailing Address Zip Code: Date your business opened:	e two-digit mo	(No spaces or dashes)	year for when
yo	e-digit mailing a ur business ope	eddress zip code, and the ned. Account Number: Malling Address Zip Code: Date your business opened: <u>Return To Login</u> <u>Cl</u>	e two-digit mo mm: yyyy: ear Form Re	onth and four-digit (No spaces or dashes)	year for when
Copyright Links	e-digit mailing a ur business ope l I FAQ Asses	Account Number: Account Number: Mailing Address Zip Code: Date your business opened: <u>Return To Login</u> <u>Cl</u>	e two-digit mo	onth and four-digit (No spaces or dashes)	year for when

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).

		Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org
571-L Business Proper	ty Statement - 2	016 Company Number:
Plea	se choose how y	Welcome
	Electro	nic 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.
	File by Ma	il (Download, Print, Complete, Sign and Mail)
	Businesses the sign and mail the statement	at choose not to file electronically this year, MUST download, print, complete, the Form 571-L statement. Our office will NOT be mailing you a hard copy
lf you	ı have any ques	stions you may call (415) 554-5531 or send email to askbpp@sfgov.org.
Copyright Links	FAQ Assesso	r Paper Filing

Fig. 3

Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org Log Off | 571-L Instructions | Help

571-L Business Property Statement - 2016

Company Number:



Questionnaire

Please check the boxes below that apply to you.

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.

- My business is a residential rental property such as an apartment house. (571-R).
- 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 your business has moved, closed, or was sold, please select one of the choices below.

- 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 Reset

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
- Download latest supported version of Internet Explorer. Click here
- Download latest version of Mozilla FireFox. Click here
- Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.

Copyright | Links | FAQ | Assessor | Paper Filing

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, 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 Information, Step 2 - General Information, 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.

<u>STEP 1</u> – **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. 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.

Step Ownersh	o 1 Step 2 ip Info General Info	Step 3 Your Propen	Step 4 ty Others' Property L	Step 5 / Certification og Off Remarks	A: 1155 Mark San Fra a 571-L Instru	Carm ssessor-R et Street, 5 ancisco, C (415) 5 skbpp@s actions	en Chu Recorder 5th Floor A 94103 54-5531 fgov.org Help
571-L Business P	roperty Statement - 20	16		Company Nu	mber:	View	/ Form
	Please review the infasterisk (*) are requir	ormation be ed. Click "s	Ownership I elow and make all ave" if you update	nformation necessary correcti d any field. Click "I	ons. All fields ma next" to save and	<u>Save</u> arked wit d procee	<u>Next</u> than d.
	Name (NOTE: If o	wned by a	sole owner or part	nership, the format	t should be last n	ame firs	t.)
	Owner Name 1:			DBA:			
	Owner Name 2:			C/O:			
	Email Address: * 🚺			_			
			Mailing /	Address			
	Street Number:			Street Direction:	•		
	Street Name/P.O.: *			Street Type:			
	Suite/Room:]	City: *			
	State: *			Zip: *			
	Country: *	United Stat	tes	-			
			Location of	f Property			
	Stre	et Number:			Street Direction:		
	Si	treet Name:			Street Type:		
	5	Suite/Room:					
	To make minor correct indicate the changes	ctions to the	e location of proper	rty (i.e. street spelli	ng, St. to Ave., e	etc.), plea	ise
	5					Save	Next
Copyright Lin	ks FAQ Assessor	View Pri	ior Years Paper	Filing			



<u>STEP 2</u> – 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).

Ste Owners 571-L Business	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org Log Off Remarks 571-L Instructions Help Property Statement - 2016
A LEG COUNTROL	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: * (Please provide a detailed description.)
	b) Local Telephone: () - Ext.# *
	Local FAX: () -
	c) Do you own the land at this business location? No 🗸 *
	If yes, is the name on your deed recorded as shown on this statement? No \checkmark *
	d) When did you start your business at this location?
	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, 2015 through December 31, 2015:
	 Did any individual or legal entity (corporation, partnership, limited liability company, etc.) acquire a "controlling interest" (see instructions for definition) in this business entity? Choose - *
	 If YES, did this business entity also own "real property" (see instructions for definition) in California at the time of the acquisition? Choose -
	 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
Copyright Li	nks FAQ Assessor View Prior Years Paper Filing

<u>STEP 3</u> – 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).

Additionally, some of the screens included are for 2015, but no changes have been made to those screens for the 2016 tax year.

- 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.

Step Ownersl	p 1 Step 2 hip Info General In	fo Your Property Other	Step 4 s' Property Log O	Step 5 Certification ff Remark	1155 Sa s 571-L In	(Asse Market St n Francis (4 askbp structio	Carme ssor-Ri treet, 5f sco, CA 415) 55 p@sfg ons	n Chu ecorder h Floor 94103 4-5531 jov.org Help
571-L Business	Property Statement	- 2015		Company N	Imper:		View	Form
NO COUNTY		Declaration of F	Property E	Belonging	to You			
					Prev	ious S	Save	Next
	The categories be changed, enter thi categories of prop	low display the total cost is year's cost and click "s erty, click "View/Update"	s you reporte ave". To char	d last year. If nge the repor	the cost of y ted cost for th	our sup he other	plies r	has
	NOTE: At this time out on Lease to O	e, we are not able to accepthers".	pt electronic s	submissions	for filers that	have "E	Equip	ment
	NOTE: Enter nume	eric characters only. Omit	commas and	l cents.				
		Category	Last Year's Cost	This Year's Cost	Operation			
		Supplies	300	300	>			
		Equipment	15809	15809	View/Update			
		Buildings/Improvements	0	2000	View/Update			
		Construction in Progress	0	0	View/Update			
Previous Save Next								
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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.

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).

Step Ownerst 571-L Business	o 1 Step 2 Step 3 Step 4 S ip Info General Info Your Property Others' Property Cen Log Off Property Statement - 2015 Co	Step 5 tification Remarks 5 mpany Numbe	A 1155 Marke San Fra as 71-L Instru r:	Carmen Chu ssessor-Recorder et Street, 5th Floor nncisco, CA 94103 (415) 554-5531 (kbpp@sfgov.org ctions Help View Form
	Schedule A: Equip The categories below summarize the totals you reported las each category by clicking "View/Update." You may add com the category from the drop-down list and clicking "Create". category description and click "Create". This allows you to	ment t year. You ma monly reporter For categories provide your d	y change the d categories not listed, e escription of	Back e cost for by selecting nter a f the property.
	Description	Last Year's Total	This Year's Total	Operation
	Machinery & Equipment: MACHINERY & EQUIPMEN	6271162	6271162	View/Update
	Office Furn & Equip: OFFICE FURN & EQUIP	432052	432052	View/Update
	Other Equipment	0	0	View/Update
	OTHER EQUIPMENT: L/E Computer (PC)	4101885	4101885	View/Update
	Tools	0	0	View/Update
	Personal Computers: COMPUTER - PC	6049071	6049071	View/Update
	Local Area Network (LAN) Equipment & Mainframes: LOCAL AREA NETWORK	11669857	11669857	View/Update
	Total	28524027	28524027	
	Select New Category 🗸 or Enter New Category:			Create
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SAMPLE OF COST DETAIL

Step 1 Step 2 Step Ownership Info General Info Your Pro	3 perty Oth	Step 4 ers' Property Log	Step 5 Certification Off Remark Company N	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org s 571-L Instructions Help umber:
The second s	Selle		JSt Detail	Save Back
The costs you reported last year	are listed. N	lake any nece	essary changes.	To save your data at any time
click "save". Clicking "back" will	allow you to	save your da	ta and proceed	back to the previous page.
Machiner	y & Equip	ment: MA	CHINERT	EQUIPMEN
	Year of Acq.	Last Year's Cost	This Year's Cost	
	2014	0	0	
	2013	436731	436731	
	2012	1071198	1071198	
	2011	571485	571485	
	2010	570246	570246	
	2009	615277	615277	
	2008	413926	413926	
	2007	492092	492092	
	2008	394473	394473	
	2005	489091	489091	
	2004	413969	413969	
	2003	62758	62758	
	2002	56118	56118	
	2001	130985	130985	
	2000	156857	156857	
	1999	175166	175166	
	1998	3805	3805	
	1997	0	0	
	1996	45148	45146	
	1995	97931	97931	
	1994	0	0	
	1993	0	0	
	Prior	73908	73908	
	Total	6271162	6271162	
				Save Back
Copyright Links FAQ Assessor View	Prior Years	Paper Fil	ing	

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).

Owners	Log Off	Remarks 5	as 71-L Instru	ctions Help
571-L Business	Property Statement - 2015 Con	npany Numbe	r: - (View Form
AND COUNTY OF	Schedule A: Equip	ment		
	The categories below summarize the totals you reported last each category by clicking "View/Update." You may add comr the category from the drop-down list and clicking "Create". F category description and click "Create". This allows you to p	year. You ma nonly reported for categories rovide your de	y change the d categories not listed, e escription of	e cost for by selecting nter a f the property.
	Description	Last	This Year's	Operation
	Description	Total	Total	
	Machinery & Equipment: MACHINERY & EQUIPMEN	Total 6271162	Total 6271162	View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP	Total 6271162 432052	Total 6271162 432052	View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment	Total 6271162 432052 0	Total 6271162 432052 0	View/Update View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment OTHER EQUIPMENT: L/E Computer (PC)	Total 6271162 432052 0 4101885	Total 6271162 432052 0 4101885	View/Update View/Update View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment OTHER EQUIPMENT: L/E Computer (PC) Tools	Total 6271162 432052 0 4101885 0	Total 6271162 432052 0 4101885 0	View/Update View/Update View/Update View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment OTHER EQUIPMENT: L/E Computer (PC) Tools Personal Computers: COMPUTER - PC	Total 6271162 432052 0 4101885 0 6049071	Total 6271162 432052 0 4101885 0 6049071	View/Update View/Update View/Update View/Update View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment OTHER EQUIPMENT: L/E Computer (PC) Tools Personal Computers: COMPUTER - PC Local Area Network (LAN) Equipment & Mainframes: LOCAL AREA NETWORK	Total 6271162 432052 0 4101885 0 6049071 11669857	Total 6271162 432052 0 4101885 0 6049071 11669857	View/Update View/Update View/Update View/Update View/Update View/Update
	Machinery & Equipment: MACHINERY & EQUIPMEN Office Furn & Equip: OFFICE FURN & EQUIP Other Equipment OTHER EQUIPMENT: L/E Computer (PC) Tools Personal Computers: COMPUTER - PC Local Area Network (LAN) Equipment & Mainframes: LOCAL AREA NETWORK Total	Total 6271162 432052 0 4101885 0 6049071 11669857 28524027	Total 6271162 432052 0 4101885 0 6049071 11669857 28524027	View/Update View/Update View/Update View/Update View/Update View/Update

Fig. 10

SAMPLE OF NEW COST DETAIL

Step Ownersh 571-L Business F	1 Step 2 ip Info General Info Your Property Ot Property Statement - 2015 Scho The costs you reported last year are listed. click "save". Clicking "back" will allow you t Other:	Step 4 Step 5 hers' Property Certification Log Off Remarks 57 Company Number: edule A Cost Detail Make any necessary changes. To sav o save your data and proceed back to MEDICAL HIGH TECH	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org 1-L Instructions Help View Form Save Back re your data at any time the previous page.
	Year of Acq. 2014 2013 2012 2011 2010 2009 2008 2007 2008 2007 2008 2007 2008 2005 2004 2003 2004 2003 2004 2003 2002 2001 2000 1999 1998 1997 1998 1995 1994 1993 Frior	Last Year's Cost This Year's Cost 0 0	
Copyright Lin	ks FAQ Assessor View Prior Yea	rs Paper Filing	Save Back



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

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

- 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."
- 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".



Fig. 12

								A	Carmen Chu
								1155 Market St	reet, 5th Floo
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	np nno c	Jeneral Inte	roarrop	onera	Log	Off Rema	nrks 571	askop -L Instructio	ons Help
571-L Business	Property :	Statement -	2015			Company	Number:		View Form
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E South E								S	ave Back
	The costs click "sav	s you report ve". Clicking	ed last year a "back" will a	re listed. Make llow you to sav	e any nece e your dat	ssary chang a and proces	es. To save ed back to ti	your data at a he previous pa	any time age.
	If "This Y displayed After savi Reported The total page for Acq", and	Year's Cost d in the "Net ing your dat d Change"a Additions/D each "Year d report it in	is different t Change" col a, you may the mount, which isposal amou of Acq". Plea Schedule D.	than the "Last umn. We requiren account for will then take ints reported o se make every	Year's Co est that this each Net you to the n Schedula effort to an	st", then this s Net Chang Change amo Schedule D a D are also ccount for th	difference e be accour ount by clic page to acc calculated a e Net Chan	will be calcula nted for in Sch king on the "U count for this d and displayed ge for each "Y	ted and hedule D. Jn- lifference. on this 'ear of
	Unrep One o cost, v cause done t accourt	orted Varian r more rows which is not for this vari by clicking o nt for the giv	ce Detected reported beling fully accounts ance and rep in the respect ven Net Chan	ow have a vari d for in Sched ort it in Schedu ive "Un-Report ge for the spec	ance (Net) ule D. Plea le D for ea ed Change sific "Year (Change) from ase make ev ach "Year of e" amount, w of Acq".	m Last Year ery effort to Acq". This o rhich will alk	's reported identify the an be ow you to	
				LHI -	STRUCT	URAL			
		Year of Acq.	Last Year's Cost	This Year's Cost	Net Change	Repor	ted on Sch Disperate	edule D Unreported Clange	
		2014	0	350000	350000			350000	
		2013	0	0					
		2012	3795092	3795092					
		2011	2789649	2789649					
		2010	816803	816803					
		2009	1694508	1694508					
		2008	2401247	2401247					
		2007	2352863	2352863					
		2006	6506982	6506982					
		2005	324431	324431					
		2004	1008965	1008965					
		2003	0	0					
		2002	185140	185140					
		2001	9/32/0	973270					
		2000	2121693	2121693					
		1999	2242142	2292/92					
		1995	6776	6005					
		1008	179040	178919					
		1005	2082601	2062501					
		1995	685597	2003391					
		1002	80442	69442					
		Prior	354150	254150					
		Total	30450849	30800849	350000	0	0	350000	
								S	ave Back
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Fig. 14

Str Owners 571-L Business	ep 1 Step 2 ship Info General Info s Property Statement - 20	Step 3 Your Property Othe 15	Step 4 ers' Property Log	Step 5 y Certification off Remarks Company Num	11 571-L ber:	As 155 Market San Fran ask Instruc	Carme sessor-R Street, 5 cisco, CA (415) 55 bpp@sfg tions View	n Chu ecorder h Floor 94103 44-5531 jov.org Help Form
	Report all acquisitions a for the period January 1 and click "Create".	Supplementa Monthly Act of Property For Category: LP and disposals report 2014 through Dec	al Sched quisition Reported II - STRUCT rted for <u>LHI</u> ember 31, 2	ule for Report s and Dispose d on Schedule URAL Acquired in 20 <u>STRUCTURAL</u> Ac 014, complete the i	ting als B D12 quired nforma	in 2012 o ation as re	n Sche equired	dule B below
	Additions: Describe and freight-in, and installation former property address acquisition. Only completed project and/or operational, other Identify completed consist statement. Describe the application. <u>Disposals</u> : Information scrapped, abandoned, st transferred.	I enter the total acq on charges, by mon s and date of transf s should be reporte rwise it should be r struction that was re e item(s) and cost(s on this property sho cold, etc) and name	uisition cos th of acquis er should be d here (e.g., reported as eported as o) as previou ould include and addres	t(s), including exci ition; transfer-in sl e reported, as well a the date the prope Construction-in-Pro- onstruction-in-pro- isly reported, in the the disposal date, ses of purchasers of	se, sala hould a as orig erty bec ogress gress o Remar metho when it	es and us also be in- inal date comes ful in Step 3 on your 20 rks section of of disp tems are o	e taxes cluded. and cos ly funct)). 014 pro n of the osal (tra either so	The tt(s) of ional perty eFile insfer, old or
								Next
	Addition	s/Disposals For Ca	tegory: LHI	- STRUCTURAL Ad	quired	in 2012		
	Category Type	e Month Yea of A/D of A	/D Cost	Description		Year Acquired	Opera	ition
	LHI - Addition	✓ Jan ✓			$\hat{}$	2012	Cre	ate
	LHI - Disposal	✓ Sep ✓ 201	2 10000	MISCLASSIFIED ITEM	$\hat{}$	2012	Update	Delete
								Next
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		Carmen Chu Assessor-Recorder
Step 1 Step 2 Step 3 Ownership Info General Info Your Property	Step 4 Step 5 Others' Property Certification	San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org
	Log Off Remarks	571-L Instructions Help
571-L Business Property Statement - 2015	Company Nun	nber: View Form



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.

Vear of	Last Year's	This Year's	Not	Reported on Schedule D		
Acq.	Cost	Cost	Change	Additions	Disposals	Unreported Change
2014	0	0				
2013	369207	369207				
2012	1897739	1897739				
2011	433572	433572				
2010	0	0				
2009	44197	44197				
2008	644766	644766				
2007	850591	850591				
2008	538228	538226				
2005	14634	14634				
2004	0	0				
2003	0	0				
2002	10700	10700				
2001	151714	151714				
2000	341909	341909				
1999	305026	205026				
1998	0	0				
1997	0	0				
1996	0	0				
1995	0	0				
1994	0	0				
1993	0	0				
Prior	0	0				
Total	5602281	5602281	0	0	0	0
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LHI - FIXTURES

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571-L Business	Property Statem	ent - 2015				Company Nu	ımber: 📒		View Form			
		Supp Mon of Pi For	lemen thly Ad roperty Category	tal So cquis / Rep : LHI - F	tions a orted o	e for Repo and Dispo on Schedu Acquired in 2	orting osals ule B					
	Report all acquisitions and disposals reported for <u>LHI - FIXTURES</u> Acquired in 2014 on Schedule B for the period January 1, 2014 through December 31, 2014, complete the information as required below and click "Create".											
	<u>Additions</u> : Dese freight-in, and i former property of acquisition.	cribe and enter t nstallation char address and da	the total a ges, by m ate of trai	icquisit ionth o nsfer sl	ion cost(s f acquisiti 10uld be r	s), including e on; transfer-i eported, as w	excise, sale in should al vell as origi	es and use Iso be inci nal date a	taxes, luded. The nd cost(s)			
	Only completed functional and/ 3).	l projects shoul or operational, o	d be repo therwise	rted he it shou	re (e.g., ti Ild be rep	ne date the pr orted as Cons	roperty bec struction-in	omes fully Progress	/ in Step			
	Identify comple property stater of the eFile app	ted construction ment. Describe t lication.	n that wa the item(s repor s) and (ted as coi cost(s) as	nstruction-in- previously re	progress o ported, in t	n your 20 the Remar	14 (s section			
	<u>Disposals</u> : Info (transfer, scrap either sold or tr	rmation on this ped, abandoned ransferred.	property I, sold, et	should c) and	include ti name and	he disposal d addresses o	late, metho f purchase	d of dispo rs when it	sal ems are			
									Next			
		Additions/Disp	osals Fo	Categ	ory: LHI -	FIXTURES A	cquired in 2	2014				
	Category	Туре	of A/D	of A/D	Cost	Descri	ption	Acquired	Operation			
	LHI - FIXTURES	Addition V	Jan 🗸				\bigcirc	2014	Create			
									Next			
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571-L Business	Property Sta	atement - 201	5			Company	y Number:		View Form
			Supplem Monthly of Prope	nental / Acqu erty R	Sche uisitio eporte	dule for Re ns and Dis ed on Sche JRES Acquired	eporting sposals edule B in 2002		
	Report all a for the peri below and	acquisitions iod January click "Create	and disposal 1, 2014 throu 	ls repor gh Dece	ted for <u>L</u> ember 31	HI - FIXTURES I, 2014, comple	Acquired into	in 2002 or rmation a	n Schedule B s required
	<u>Additions</u> : freight-in, a former pro of acquisit	Describe and and installati perty addres ion.	d enter the to on charges, s and date o	otal acqu by mon f transfe	uisition o th of acq er should	cost(s), includi uisition; trans l be reported, a	ng excise, fer-in shou as well as o	sales and Id also be original da	use taxes, included. The ite and cost(s)
	Only comp functional 3).	leted project and/or opera	s should be tional, other	reporte wise it s	d here (e should be	.g., the date th e reported as (e property Constructio	becomes n-in-Prog	fully ress in Step
	Identify co property s of the eFile	mpleted cons tatement. Do application.	struction tha escribe the it	t was re tem(s) a	ported a nd cost(s constructior s) as previous	n-in-progre ly reported	ss on you , in the Re	r 2014 marks section
	<u>Disposals</u> : (transfer, s either sold	Information crapped, aba or transferre	on this prop andoned, sol ed.	erty sho d, etc) a	ould inclu and name	ude the dispos e and addresse	al date, me es of purch	thod of d asers who	isposal en items are
									Next
		Additio	ns/Disposal	s For Ca	tegory:	LHI - FIXTURE	S Acquired	in 2002	
	Category	Туре	Month of A/D	Year of A/D	Cost	Descrip	otion	Year Acquired	Operation
	LHI - FIXTURES	Addition	✓ Jan ✓				\sim	2002	Create
	LHI - FIXTURES	Disposal	V Dec V	2014	10000	REMOVE SHO PARTITIONS	RT 🗘	2002	Update Delete
									Next
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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).

Step 1 Step 2 Ownership Info General In 571-L Business Property Statement	Step 3 To Your Property Othe - 2015	118 Step 4 Step 5 rs' Property Certification Log Off Remarks 571-L Company Numt	Carmen Chu Assessor-Recorder 55 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org Instructions Help 7003 View Form
Below is the detail year by changing section. Click save Important: Please construction is pe	Construction information by year for the value. You may creat to update your changes provide a detailed descr rsonal or real property. T Const	your assets. You may update the cos e a new year by entering the year and pition. The Assessor's office must de the detail will prevent any duplication ruction in Progress	Save Back t value for a given t cost in the create termine whether the of assessments.
	Year of Acq. Update Section 2012 3232349 Total 3232349 Create Section	Description CONSTRUCTION IN PROG	
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Fig. 19

<u>STEP 4</u> – 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 2016 on step 4 and you did not report any leased equipment, vending equipment and other business in 2015, proceed to Step 5 - Certification, by clicking on the tab of the page.





✤ 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 (Fig. 22). To delete a leased equipment item, check the box under "Delete" column (Fig. 23). 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.

Step Ownersh 571-L Business F	1 Step 2 ip Info General I Property Statemer	Step 3 nfo Your Property Ott nt - 2015	Step 4 Step 5 hers' Property Certificat Log Off Rem Compan	1155 S ion arks 571-L Io y Number:	Carmen Chu Assessor-Recorder Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org nstructions Help View Form
	To add a new les "View/Update." T	sor, click "Create Lesso o delete a lessor and all	Lessor or." To edit an existing les l associated leases, click	ssor or lease info "delete lessor."	ormation click ate Lesson Back
	Lessor Name	Street	City	State, Zip	Operation
	ABC CORP	888 MARKET ST	SAN FRANCISCO	CA, 94103	View/Update Delete Lessor
	BBZZ	222 STREET	SAN FRANCISCO	CA, 94102	View/Update Delete Lessor
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571-L Business I	Property Statement - 201	5		Company Nu	umber:	View Form
		_				
	Enter the data requeste	d below regard	te/Update ling your lease	Lessor Data	Cano	el Save Back
		Less	or Name and M	Mailing Address		
	Lessor Name: 1	ABC CORP				
	Street Number	: 888		Street Direction	n:	~
	Street Name or P.O. Box	: MARKET		Street Type	e: STREET	~
	Suite/Room	:		City	Y: SAN FRANC	ISCO
	State	: California	~	Zij	p: 94103	
	Country	: United State	s	~		
-				D 14		
Tax Obligati	ion Code O	Year Year of of Acq. Mfr.	O Lease ID	Description	Cost To Purchase New	Annual Delete Rent
Update Secti	on					
Lessee	Capitalized L V	2014 U	12345	COPIER	σ	5000
Lessor	✓ Lease-Purch ✓	2014 2013	12435	LAN	10000	1000
Lessor			7 []			
Lessor	✓ Leased Equ ✓					
Lessor	✓ Leased Equ ✓					
Lessor	✓ Leased Equ ✓					
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571-L Business P	Property Statement - 2	2015		Company Nun	nber: 📕 📔	View Form
	Enter the data reque	Creat	e/Update L	essor Data.	Cancel Sa	ive <u>Back</u>
		Lesso	or Name and Ma	ailing Address		
	Lessor Nam	e: *				
	Street Num	ber:		Street Direction:	~	
	Street Name or P.O. B	Box:		Street Type:		~
	Suite/Ro	om:		City:		
	St	ate:	~	Zip:		
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Lessor	✓ Leased Equ ✓]
					Cancel Sa	ve Back
Copyright Link	ks FAQ Assesso	r View Prior Ye	ars Paper Fil	ling		
Vending Equipment - Follow the same steps as described in the Leased Equipment section (Page 32) of this document to update this section (Fig. 24 to 26).

Step Ownershi	1 Step 2 ip Info General Info	Step 3 Ste Your Property Others' I	p 4 Step 5 Property Certification Log Off Remark	1155 N Sa 15 571-L Ins	Carmen Chu Assessor-Recorder Market Street, 5th Floor n Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org structions Help
5/1-L Business P	roperty Statement - 20 To add a new vendor, "View/Update." To del	rio click "Create Vendor." T ete a vendor, click "Dele	Company N /endor o edit an existing vend te Vendor."	umber:	information click
	Vendor Name	Street	City	State, Zip	Operation
	AABB COMPANY	1111 HOWARD ST	SAN FRANCISCO	CA, 94111	View/Update Delete Vendor
	2222	5555 FOLSOM ST	SAN FRANCISCO	CA, 94112	View/Update Delete Vendor
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Step Ownersh	1 Step 2 ip Info General Info Yo	Step 3 Step 4 our Property Others' Property Log	Step 5 Certification Off Remarks	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org 571-L Instructions Help
571-L Business P	Property Statement - 201	5	Company Num	ber: View Form
	Enter the vendor data b	Vending Equ	uipment	Cancel Save Back
		Vendor Name and Ma	ailing Address	
	Vendor Name: *			×
	Street Number		Street Direction:	~
	Street Name or P.O. Box		Street Type:	STREET V
	Suite/Room:	:	City:	
	State	· • •	Zip:	
	Country	United States	~	
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571-L Business F	Property Statement - 2015	i	Company Numb	er: View Form
	Enter the vendor data be	Vending Equ	uipment	<u>Cancel Save</u> Back
		Vendor Name and Ma	ailing Address	
	Vendor Name: *			
	Street Number:		Street Direction:	~
	Street Name or P.O. Box:		Street Type:	~
	Suite/Room:		City:	
	State:	~	Zip:	
	Country:	United States	~	
	Create Section 1.	Model and Desc	ription	Delete I
				Cancel Save Back
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Other Businesses - Follow the same steps as described in the Leased Equipment section (Page 32) of this document to update this section (Fig. 27 to 29).

Step Ownersh 571-L Business F	1 Step 2 ip Info General Info Property Statement -	Ste Your P 2015	ep 3 Step 4 Property Others' Pro	perty Certi Log Off I Corr	1155 Sication Remarks 571-L In Ipany Number:	Carmen Chu Assessor-Recorder Market Street, 5th Floor an Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org nstructions Help View Form
	To add a new busine click "View/Update."	ess, click To dele	Other B « "Create Business." te a business, click "	USINESSE To edit an e Delete Busir	S xisting business own ness." <u>Create</u>	ner's information e 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
Create Business Back Copyright Links FAQ Assessor View Prior Years Paper Filing						

Step Ownershi 571-L Business P	1 Step 2 ip Info General Info You Property Statement - 2015	Step 3 Step 4 Ir Property Others' Property Log	Step 5 Certification Off Remarks Company Num	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org 571-L Instructions Help Iber:
	Enter the data below rega	Other Busin	I ESSES J business at this	<u>Cancel Save Back</u> location.
8.0		Other Business Name and	d Mailing Address	5
	Business Name: *			
	Street Number:		Street Direction:	~
	Street Name or P.O. Box:		Street Type:	STREET V
	Suite/Room:		City:	SAN FRANCISCO
	State:	California 🗸	Zip:	
	Country:	United States	~	
	Type of Business: *	RETAIL		
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071-L Business i	Property Statement - 2015			Company Nun	iber:	viev	vForm
NO COUNTI O		Othe	er Busin	esses			
					Cancel	Save	Back
	Enter the data below rega	arding other compa	anies doing	business at this	location.		
3.0		Other Busines	s Name and	d Mailing Addres	5		
	Business Name: *						
	Street Number:			Street Direction:	~]	
	Street Name or P.O. Box:			Street Type:			~
	Suite/Room:			City:			
	State:		~	Zip:			
	Country:	United States		~			
	Type of Business: *						
					Cancel	Save	Back

<u>STEP 5</u> – 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. 30). You cannot complete the process unless you address the necessary corrections.
- 3. Complete the Declaration section (Fig. 31). 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. 32).
- 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

Step Ownersh	1 Step 2 ip Info General Info Yo	As 1155 Market Step 3 Step 4 Step 5 Sour Property Others' Property Certification ask Log Off Remarks 571-L Instruct	Carmen Chu sessor-Recorder Street, 5th Floor cisco, CA 94103 (415) 554-5531 bpp@sfgov.org tions Help
071-L Business P	roperty statement - 201	5 Company Number	
AND COUNTY OF		Certification	
			Previous
		Certification Incomplete	
48.03	The following	g corrections must be made before you can submit your stateme	nt.
	Page/Link	Description	
	<u>Step 2 (f)</u>	Required information is missing on the General Info page, Step 2 (Please fill out all required fields as designated by an asterisk (*). S data, then return to this certification page.	f). ave the
	Step 3 Schedule B	An unaccounted difference in reported costs for Schedule B has be detected. Please review each category in Schedule B and insure that any dif reported costs from last year are fully accounted for in Schedule D	een ferences in
	Step 4	There are no items declared in "Property Belonging to Others,", If have any Leased Equipment, Vending Equipment or Other Busine then click here to acknowledge. Otherwise, finish Step 4 before your statement.	you do not ss to report submiting
	If you have made any cha	anges from this page, Click Here to re-evaluate your corrections.	
			Previous
Copyright Linl	ks FAQ Assessor	Paper Filing	

					Carmen Chu Assessor-Recorder
Ste	ep 1 Step 2	Step 3	Step 4	Step 5	1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531
Owners	nip Into "General Int	o Your Property	Log Off Re	marks 571-L 1	askbpp@sigov.org Instructions Help
571-L Busines	s Property Statement	- 2016		Company	Number:
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	Certifica Statemen Complet If you do any char To review 'View Fo	ation is not completed in the second	te until you submit on certification you with a confirmatior at this time, you ma e to this form. prior to submission,	t your statement t will receive a "C n number. y click the "Save" you may click the	via the "Submit ertification link to retain
	Note: The following of penalties. Amendmen I declare under pena this property stateme and to the best of my property required to by the person named further declare that I assessee and all co-of submitted. If you do	declaration must b the must be filed v lty of perjury und ent, including acce y knowledge and b be reported which d as the assessee i am authorized to owners and/or par not do so, it may	e completed. If you a hard copy once y er the laws of the St ompanying schedul elief it is true, corra is owned, claimed in this statement at f submit this stateme thers. The following result in penalties.	i do not do so, it ou have certified tate of California es, statements ou ect, and complet I, possessed, cor 12:01 a.m. on Jan int as the assess g declaration mus	may result in that I have examined r other attachments, e and includes all htrolled, or managed huary 1, 2016; and, I se, or on behalf of the st be completed and
		Ownershi	p Type and Business De	scription	
	Ownership Type: *	Proprietorship 🚽	Business * Description:	Retail	•
	P	Please enter your Feder	al Employer ID number t	o certify this Stateme	ənt
	Federal Employer ID #:	I			
			Preparer Information		
	Preparer's Name: *		Title: *		
	Full Address: * 📀				
	Telephone #: *	() -	Extn #		
		A	iditional information	୭	
	Name of Assessee or * Authorized Agent:		O Title:		
	Name of Legal Entity (other than DBA):				
		View Form	<u>Save</u> Edit Costs Subn	nit Statement	
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Copyright I	links FAQ Asses	sor Paper Filing			

Fig. 31



II (B). BUSINESS MOVED/CLOSED/SOLD

The "Questionnaire" screen includes four additional questions (indicated in the red box below) (Fig. 33). Depending on your selection, you will be redirected to another page to provide additional information. Please refer to the appropriate section below.

	Carmen Chu Assessor-Recorder 1155 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbp@sfgov.org Log Off 571-L Instructions Help
571-L Business F	Property Statement - 2016 Company Number:
A STO COUNTY OF	Questionnaire
	Please check the boxes below that apply to you.
	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.
	My business is a residential rental property such as an apartment house. (571-R).
	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 your business has moved, closed, or was sold, please select one of the choices below.
	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 Reset
	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 Download latest supported version of Internet Explorer. <u>Click here</u> Download latest version of Mozilla FireFox. <u>Click here</u> Adobe PDF Reader is required if you want to view the 571-L Instructions or Paper Filing form.
Copyright Lin	nks FAQ Assessor Paper Filing



II (BI). BUSINESS MOVED TO ANOTHER LOCATION <u>WITHIN</u> 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. 34). Click "Save" and "Submit" to go to the next screen.





Move 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. 35). When you are finished, click "Submit."





Once, you click "Submit," you will be directed to the "Closure of Account Certification Complete" page (Fig. 36).



Move 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. 37).



Fig. 37

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 <u>OUTSIDE</u> 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. 38). Click "Save" and "Submit" to go to the next screen.

						Log Off	571-L Instructions Help
571-L Business P	Property Statement - 2016						Company Number:
	Closure of Account Additional Information Needed 'ou have indicated that your business has moved out of the county. Please provide the following information nd click "Submit" to continue. If you wish to continue at a later time, you may click the "Save" link to retain ny changes you have made to this form						
	Date move	Date moved : * 04/05/2015 (MM/DD/YYYY)					
			Contac	ct Infor	mation		
	Contact Name: *					Title: *	
	Phone #: *	(-		Ext. 000	000	
	E-mail: *				1		
	Lease Termination Date: *			(MM/D	D/YYYY)		
	Name of Sub-tenant, if any:						
			New Ma	ailing	Address		
	Street Number:				Street D	irection:	•
	Street Name/P.O.: *				Stre	eet Type:	-
	Suite/Room:					City: *	
	State: *		•			Zip: *	
			Back S	ave	Submit		
Copyright Lin	ks FAQ Assessor View F	Prior Ye	ears				



Move 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. 39). When you are finished, click "Submit."





Once, you click "Submit," you will be directed to the "Closure of Account Certification Complete" page (Fig. 40).



Move is after the lien date

If the move date you indicated is **after** the lien date, you will be directed to the "Continue eFiling" page (Fig. 41).



Fig. 41

Once you click "Begin eFiling," you will then be taken to the "Ownership" page, which is Step 1 of the eFiling 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. 42). Click "Save" and "Submit" to go to the next screen.

				Log Of	f 571-L Instructions Help	
571-L Business P	roperty Statement - 2016				Company Number:	
	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 close	d: *	08/14/2015	(MM/DD/YYYY)		
			Contact Infor	rmation		
	Contact Name: *			Title: *		
	Phone #: *	() 📰 - 🔳	Ext. 00000		
	E-mail: *					
	Lease Termination Date: *		(MM/E	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 Lin	ks FAQ Assessor					

Fig. 42

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. 43). When you are finished, click "Submit."

	Log Off 571-L Instructions Help
571-L Business	Property Statement - 2016 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: * Business * Description:
	Please enter your Federal Employer ID number to certify this Statement
	Federal Employer ID #:
	Preparer Information
	Preparer's Name: * Title: *
	Full Address:* (2)
	Telephone #:* () Extr # 00000
	Additional Information ③
	Name of Assessee or * Authorized Agent:
	Name of Legal Entity (other than DBA):
	Back Save Submit
Copyright Li	inks FAQ Assessor



After submission, you will be directed to the "Closure of Business Certification Complete" page (Fig. 44).



Fig. 44

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 eFiling" page (Fig. 45).





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

II (BIV). BUSINESS SOLD

If your business moved closed, you are required to update all the fields marked with a red asterisk (*) before you can go to the next step (Fig. 46). Click "Save" and "Submit" to go to the next screen.

			Log Off 571-L Instructions	Help				
571-L Business P	roperty Statement - 2016		Company Number: 💻					
	Sale of Business Additional Information Needed You have indicated that your business was sold. Please provide the following information and click "Submit' continue. If you wish to continue at a later time, you may click the "Save" link to retain any changes you ha made to this form							
	Date sold	12/31/2015	L5 (MM/DD/YYYY)					
		New Owner's	's Contact Information					
	Owner/Entity: *							
	Contact Name: *		Title: *					
	Phone #: * (l) 📕 - 📕 E	Ext. 00000					
	E-mail: *							
	Seller's New Mailing Address							
	Street Number:		Street Direction:					
	Street Name/P.O.: *		Street Type:					
	Suite/Room:		City: *					
	State: *	•	Zip: *					
Convright Lin	ks FAQ Assessor	<u>Back</u>	<u>Save</u> <u>Submit</u>					

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. 47). When you are finished, click "Submit."

				Log Off 571-L Instructions Help					
siness	Property Statement - 2	016		Company Number:					
OF SAN FRAM	Sale of Business Certification Your company status has been saved. To finalize this process, fill out the information below and cl "Submit". If you wish to continue at a later time, you may click the "Save" link to retain any chang you have made to this form.								
	Declaration								
	By submitting this forr are authorized to sub and/or partners. Furthe the best of your knowl	n you declare under penal mit this information as the ermore, you certify that the edge and belief.	ty of perjury unde e assessee, or or e information provic	r the laws of the State of California that you a behalf of the assessee and all co-owners ded thus far is true, correct, and complete to					
		Ownership Typ	pe and Business D	escription					
	Ownership Type: *	Proprietorship 💌	Business * Description:	Retail					
	PI	ease enter your Federal En	nployer ID number	to certify this Statement					
	Federal Employer ID #:								
		Pre	parer Information						
	Preparer's Name: *		Title: *						
	Full Address: * 💿								
	Telephone #: *	(()) () - () E	tn # 00000						
		Additic	onal Information	D					
	Name of Assessee or * Authorized Agent:		Title:						
	Name of Legal Entity (other than DBA):								
ī	nks FAO Assesso	Back	<u>Save</u> Subm	<u>iit</u>					



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 eFiling" page (Fig. 48).



Fig. 48

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



III. FILING A FORM 571-L 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 or Form 571-R Apartment House Property Statement, whichever applicable.

In February 2016, you received one of the following four Notices: (1) *Notice of Requirement to File 2016 Form 571-L Business Property Statement*, (2) *Notice to e-File 2016 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 Section V.

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, <u>www.sfassessor.org/efile</u>, and click on "<u>FILE 2016 STATEMENT</u>" (Fig. 49).



2. Follow the same steps as described in the II (A) II on page 10-11 to logon and/or retrieve your PIN as appropriate (Fig 50 & 51).



Fig. 50

571.1 Business	'ronerty Statement - 20	116	_	Home	115 571-L Ins	Carmen Chu Assessor-Recorder 5 Market Street, 5th Floor San Francisco, CA 94103 (415) 554-5531 askbpp@sfgov.org tructions Help
	o retrieve your PIN, p ive-digit mailing addre our business opened	Forg lease enter your nin- ess zip code, and the	got My Pl e-digit acce e two-digit	N sunt numb month and	er without d I four-digit	dashes, the year for when
	Mai	Account Number:		(Nio space	es or dashes)	
Copyright Lin	Date <u>F</u> ag Assessor	your business opened: Return To Login <u>Ci</u> k	mm: :	m ^r Retrieve	My PIN	



3. Click on the "File by Mail (Download, Print, Complete, Sign and Mail)" button (Fig. 52).



Fig. 52

4. A prompt window will appear, then click on "<u>Form 571-L [PDF]</u>" (Fig. 53) or "<u>Form 571-R [PDF]</u>" (Fig. 54), whichever applicable, to download the Form.

Additionally, some of the screens included are for 2015s, but no changes have been made to those screens for the 2016 tax year.

Close: [X]
Paper Filing
Form 571-L 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:
Form 571-L [PDF]
Click here to View Instructions
Acrobat Acrobat Reader
If you do not have Adobe PDF Reader, you may download it here
Close Window
Fig. 53

	Assessor-Record 1155 Market Street, 5th Flo San Francisco, CA 941 (415) 554-55 askbpp@sfgov.or Log Off 571-R Instructions Help				
5/1-R Apartmer	It House Property Statement - 2015				
SAD COUNTY O	File By Mail				
E State					
the last	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.				
1475 · 020	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:				
	Form 571-R [PDF]				
	Click here to View Instructions				
	Actobat Actor Reader				
	If you do not have Adobe PDF Reader, you may download it here				
	If you have any questions you may call (415) 554-5531 or send email to askbpp@sfgov.org.				
Copyright Li	nks FAO Assessor Paper Filing				

5. After clicking on "Form 571-L [PDF]" (Fig. 55) or "Form 571-R [PDF]" (Fig. 56), the browser will open a new tab containing the Form 571-L or Form 571-R and schedules. Please check all the information to ensure accuracy.

RETURN THIS ORIGINAL FORM. COPES WILL NOT BE ACCEPTED. FILE RETURNS VARIEL, 2015	CARMEN CHU, A BUSINESS PR CITY & COUNT 1155 Market SL, 5 th Floor, San Francisco, (DECLARATION OF COSTS AND O' AS OF 12:01 /	ASSESSOR-RECORD OPERTY STATEMEN IV OF SAN FRANCISCO CA 94103 • ackbpp@sfgov.org THER RELATED PROPERTY IN A.M., JANUARY 1, 2015	ER T www.sfassessor.org FORMATION	201
ACCOUNT NUMBER LA BY LOC	ATION OF RECORDS	ROLLO	U	VOL BLK LOT
NAME AND MAILING ADDRESS	,		LOCATION C (Fie a separate s	DF PROPERTY alternent for each location)
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- 6. Print the Form and schedules.
- 7. You are required to submit a document with an Assessor's Office generated bar code on it. Therefore, a barcode has to appear on the front page (see images Fig. 55 & Fig. 56). If there is no barcode or only numbers show up, the barcode is incorrectly printed. Please review if your browser is the latest version. If not, please download the latest version 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 \equiv 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. 57).

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- 8. Complete the Form 571-L or Form 571-R 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 preprinted 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 addresses changes, 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 the 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 does 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.



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



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, call (415) 554-5531.

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 2016 Form 571-L Business Property Statement. Instead, you will receive one of the following documents: (1) Notice of Requirement to File 2016 Form 571-L Business Property Statement, (2) Notice to e-File 2016 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 call our office at (415) 554-5531 or email askbpp@gov.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 2016 Form 571-L Business Property Statement; and (2) Notice to e-File 2016 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 1st.

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

Yes. By law, the both Form 571-L Business Property Statement and Form 571-R Apartment House Property Statement are a confidential document. It is not a 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). *If May 7 falls on a Saturday, Sunday, or legal holiday, a property statement that is mailed and postmarked on the next business day shall be deemed to have been filed on May 7.* 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, <u>www.sfassessor.org/efile</u>, and click on "File 2016 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 "By Mail Filing" 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.

Yes, you need to notify our office the movement of your business. Please go to the San Francisco County Assessor's e-Filing website, <u>www.sfassessor.org/efile</u>, and click on "File 2016 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 "By Mail Filing" 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 this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance. 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.

15. My business has moved to a new location outside of San Francisco.

Yes, 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, <u>www.sfassessor.org/efile</u>, and click on "File 2016 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. Upon received the information from you, we will close your account; or (2) Click "By Mail Filing" 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 this is not done, the Assessor may not be aware of that fact, and may continue to assess the property despite its true circumstance.

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.

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, <u>www.sfassessor.org/efile</u>, and click on "File 2016 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 "By Mail Filing" 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.

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

Yes, the filing laws apply to non-profit organizations. However, nonprofit 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 through I, call (415) 554-5658; J through R, call (415) 554-5584; and S through Z, call (415) 554-5250.

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 <u>www.sfassessor.org</u>, click on "Forms & Notices" in blue bar, and then click on "View All" under "Forms." 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 <u>askbpp@sfgov.org</u> 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) 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 and Form 571-R Apartment House 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/571-R 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/571-R must be signed by an LLC manager. If the Form 571-L/571-R 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 call the Business Division at (415) 554-5531 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. How much will my taxes be?

Applying the 2016 tax rate of 1.1826% will give a conservative estimate of what the actual tax liability will be. Proposition 13 established a tax rate of 1% of the value of assessable property. San Francisco tax rate is determined by the Board of Supervisors, based on property assessed value and bond measures passed by San Francisco voters. For example, if the business depreciated assessed value is \$125,000 the property taxes on the business assets will be approximately \$1,478.

26. When will I receive my bill?

If you file your Form 571-L Business Property Statement and/or Form 571-R Apartment House 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 2015, you reported a \$2,000 computer you acquired in 2005 then sold prior to January 1st, 2016. In this year's filing (2016), you should exclude the \$2,000 cost from the cost reported for the 2005 year of acquisition. Do not report negative costs in 2015 or deduct it from 2015 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 (415) 554-5531 to speak to 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
 - Wednesday, March 2nd, 2016 from 10:00-11:00 a.m.
 - Thursday, March 24th, 2016 from 4:00-5:00 p.m.
- Call our Office at (415) 554-5531 or email askbpp@sfgov.org.

V (A). 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 2016 Form 571-L Business Property Statement, a Notice To e-File 2016 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 2016 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)
- 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" 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, <u>www.sfassessor.org/efile</u>, and click on "FILE 2016 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 the two-digit month 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.



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.

Email:	askbpp@sfgov.org
Fax:	(415) 554-5544
Telephone:	(415) 554-5531
Address:	Office of the Assessor-Recorder Business Personal Property Division 1155 Market Street, 5 th Fl. San Francisco, CA 94103



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)

New Business Registration Form

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

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Y ASSESSEE INSUMAIONS. THIS STATEMENT SUBJECT TO AUDIT INFORMATION PROVIDED ON A PROPERTY STATEMENT MAY BE SHARED WITH THE STATE BOARD OF EQUALIZATION BOE-571-L (P2) REV. 21 (05-15)

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BOE-571-L (P3) REV. 21 (05-15)

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

BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS 3. LAND AND LAND DEVELOPMENT (e.g., fill, grading) LINE NO LAND Calenda IMPROVEMENTS (e.g., blacktop, curbs, fences) Year of Acq. 1. 2. STRUCTURE ITEMS ONLY (see instructions) FIXTURES ONLY (see instructions) ASSESSOR'S USE ONLY ASSESSOR'S USE ONLY ASSESSOR'S USE ONLY ASSESSOR'S USE ONLY COST COST COST соѕт Prior Total Add TOTALS on line 70 and any additional schedules. ENTER HERE AND ON PART II, LINE 4 Have you received allowances for tenant improvements for the current reporting period that are not reported above? 🛛 Yes 🖓 No. If yes indicate amount \$

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

REMARKS:

BOE-571-L (P4) REV. 21 (05-15)

OFFICIAL REQUEST

DO NOT RETURN THESE INSTRUCTIONS

California law prescribes a yearly ad valorem tax based on property as it exists at 12:01 a.m. on January 1 (tax lien date). This form constitutes an official request that you declare all assessable business property situated in this county which you owned, claimed, possessed, controlled, or managed on the tax lien date, and that you sign (under penalty of perjury) and return the statement to the Assessor's Office by the date cited on the face of the form as required by law. Failure to file the statement during the time provided in section 441 of the Revenue and Taxation Code will compel the Assessor to estimate the value of your property from other information in the Assessor's possession and add a penalty of 10 percent of the assessed value as required by section 463 of the Code.

If you own taxable personal property in any other county whose aggregate cost is \$100,000 or more for any assessment year, you must file a property statement with the Assessor of that county whether or not you are requested to do so. Any person not otherwise required to file a statement shall do so upon request of the Assessor regardless of aggregate cost of property. The Assessor of the county will supply you with a form upon request.

Except for the "DECLARATION BY ASSESSEE" section, you may furnish attachments in lieu of entering the information on this property statement. However, such attachments must contain all the information requested by the statement and these instructions. The attachments must be in a format acceptable to the Assessor, and the property statement must contain appropriate references to the attachments and must be properly signed. In all instances, you must return the original BOE-571-L.

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T	TO AUDIT.	BE HELD SECRET BY THE ASSESSOR.	FULLY EXPLAIN ALL ADJUSTMENTS.

INSTRUCTIONS

(complete the statement as follows)

NAME. If the information has been preprinted by the Assessor, make necessary corrections. INDIVIDUALS, enter the last name first, then the first name and middle initial. PARTNERSHIPS must enter at least two names, showing last name, first name and middle initial for each partner. CORPORATIONS report the full corporate name. If the business operates under a DBA (Doing Business As) or FICTITIOUS NAME, enter the DBA (Fictitious) name under which you are operating in this county below the name of the sole owner, partnership, or corporation.

LOCATION OF THE PROPERTY. Enter the complete street address. Forms for additional business or warehouse locations will be furnished upon request. A listing may be attached to a single property statement for your vending equipment leased or rented to others, when any such properties are situated at many locations within this county.

USE TAX INFORMATION

California use tax is imposed on consumers of tangible personal property that is used, consumed, given away or stored in this state. Businesses must report and pay use tax on items purchased from out-of-state vendors not required to collect California tax on their sales. If your business is not required to have a seller's permit with the State Board of Equalization, the use tax may be reported and paid on your California State Income Tax Return or directly to the State Board of Equalization using our pay use tax on one-time purchase option available online. Obtain additional use tax information by calling the State Board of Equalization Information Center at 1-800-400-7115 or from the website - http://www.boe.ca.gov/sutax/usetax.htm#page=Business.

Part I: GENERAL INFORMATION

[complete items (a) through (g)]

OWNERSHIP OF LAND — (c). Check either the YES or the NO box to indicate whether you own the land at the LOCATION OF THE PROPERTY shown on this statement. If YES is checked, verify the official RECORDED NAME on your DEED. If it agrees with the name shown on this statement, check the second YES box. If it does not agree, check the second NO box.

LOCATION OF RECORDS — (e and f). Enter the address or addresses at which your general ledger and all related accounting records are maintained and available for audit. If you enter your tax agent or representative's address, indicate whether all or only part of the records are at that address, and the location of the remainder, if applicable.

PROPERTY TRANSFER - (g).

Real Property – For purposes of reporting a change in control, real property includes land, structures, or fixtures owned or held under lease from (1) a private owner if the remaining term of the lease exceeds 35 years, including written renewal options, (2) a public owner (any arm or agency of local, state, or federal government) for any term or (3) mineral rights owned or held on lease for any term, whether in production or not.

BOE-571-L (P6) REV. 21 (05-15)

- 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.
- 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.

SCHEDULE A - COST DETAIL: EQUIPMENT

Do not include property already reported in Part III.

LINES 11-46. Enter in the appropriate column the cost of your equipment segregated by calendar year of acquisition, include short-lived or expensed equipment. Total each column. Report full cost; do not deduct investment credits, trade-in allowances or depreciation. Include equipment acquired through a lease-purchase agreement at the selling price effective at the inception of the lease and report the year of the lease as the year of acquisition (if final payment has not been made, report such equipment in PART III). Report self-constructed equipment used by you at the proper trade level in accordance with Title 18, section 10, of the California Code of Regulations. Exclude the cost of normal maintenance and repair that does not extend the life nor modify the use of the equipment. Exclude the cost of equipment actually removed from the site. The cost of equipment retired but not removed from the site must be reported. Segregate and report on PART II, line 3, the cost of equipment out on lease or rent.

Include special mobile equipment (SE Plates). Exclude motor vehicles licensed for operation on the highways. However, you must report overweight and oversized rubber-tired vehicles, except licensed commercial vehicles and cranes, which require permits issued by the Department of Transportation to operate on the highways. If you have paid a license fee prior to January 1 on these large vehicles, contact the Assessor for an *Application for Deduction of Vehicle License Fees from Property Tax* and file it with the Tax Collector. Report overweight and oversized vehicles in Column 3.

Computers used in any application directly related to manufacturing, or used to control or monitor machinery or equipment, should be reported in Column 1. Do not include application software costs in accordance with section 995.2 of the California Revenue and Taxation Code. Personal Computers should be reported on Schedule A, column 5a; Local Area Network (LAN) equipment, including LAN Components, and Mainframes should be reported on Schedule A, column 5b. Personal computers include the following: Desktops, Docking Stations, Ink Jet Printers, Laptops, Laser Printers, Mini Towers, Monitors, Netbooks, Notebooks, PC Power Supply, Scanners, Workstations. Local Area Network Equipment includes the following: External Storage Devices, Hubs, Mainframes, Network Attached Storage Devices, Routers, Servers, Switches. LAN Components include, but are not limited to, the following: Network Disk & Tape Drives, Network Fan Trays, Network Memory, Network Portable Storage Devices, Network Power Supply, Network Adaptors, Network Interface Cards, Network Processors.

If necessary, asset titles in Schedule A may be changed to better fit your property holdings; however, the titles should be of such clarity that the property is adequately defined.

LINES 18, 32, 33 and 45. For "prior" years acquisition, you must attach a separate schedule detailing the cost of such equipment by year(s) of acquisition. Enter the total cost of all such acquisitions on lines 18, 32, 33 and 45.

LINE 35. Add totals on lines 19, Column 4; line 33, Column 5a; line 34, Columns 1, 2, 3; line 46, Column 5b; and any additional schedules. Enter the same figure on PART II, line 2, that you entered in the box.

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

LINES 47-71. Report by calendar year of acquisition the original or allocated costs (per your books and records) of buildings and building or leasehold improvements; land improvements; land and land development owned by you at this location on January 1. Include finance charges for buildings or improvements which have been constructed for an enterprise's own use. If no finance charges were incurred because funding was supplied by the owner, then indicate so in the remarks. In the appropriate column enter costs, including cost of fully depreciated items, by the calendar year of acquisition and total each column. Do not include items that are reported in Schedule A.

If you had any additions or disposals reported in Columns 1, 2, 3, or 4 during the period of January 1, 2015 through December 31, 2015, attach a schedule showing the month and year and description of each addition and disposal. Enclosed for this purpose is BOE-571-D, Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B of the Business Property Statement. If additional forms are needed, photocopy the enclosed BOE-571-D.

BOE-571-L (P5) REV. 21 (05-15)

Controlling Interest – When any person or legal entity obtains more than 50 percent of the voting stock of a corporation, or more than a 50 percent ownership interest in any other type of legal entity. The interest obtained includes what is acquired directly or indirectly by a parent or affiliated entity.

Forms, Filing Requirements & Penalty Information – Contact the Legal Entity Ownership Program Section at 916-274-3410 or refer to the Board's website at www.boe.ca.gov to obtain form BOE-100-B, applicable filing requirements, and penalty information.

Part II: DECLARATION OF PROPERTY BELONGING TO YOU

Report book cost (100 percent of actual cost). Include excise, sales, and use taxes, freight-in, installation charges, and all other relevant costs. Report any additional information which will assist the Assessor in arriving at a fair market value. Include finance charges for buildings and improvements that are constructed or otherwise produced for an enterprise's own use (including assets constructed or produced by others) for which deposits or progress payments have been made. **Do not** include finance charges for purchased equipment.

LINE 1. SUPPLIES. Report supplies on hand, such as stationery and office supplies, chemicals used to produce a chemical or physical reaction, janitorial and lavatory supplies, fuel, sandpaper, etc., at their current replacement costs. Include medical, legal, or accounting supplies held by a person in connection with a profession that is primarily a service activity. Do not include supplies which will become a component part of the product you manufacture or sell.

LINE 2. EQUIPMENT. Enter total from Schedule A, line 35 (see instructions for Schedule A).

LINE 3. EQUIPMENT OUT ON LEASE, RENT, OR CONDITIONAL SALE TO OTHERS. Report cost on line 3 and attach schedules showing the following: equipment actually out on lease or rent, equipment out on a conditional sale agreement, and equipment held for lease or rent which you have used or intend to use must be reported. Equipment held for lease or rent and not otherwise used by you is exempt and should not be reported.

Equipment out on lease, rent, or conditional sale. (1) Name and address of party in possession, (2) location of the property, (3) quantity and description, (4) date of acquisition, (5) your cost, selling price, and annual rent, (6) lease or identification number, (7) date and duration of lease, (8) how acquired (purchased, manufactured, or other — explain), (9) whether a lease or a conditional sale agreement. If the property is used by a free public library or a free museum or is **used exclusively** by a public school, community college, state college, state university, church, or a nonprofit college it may be exempt from property taxes, provided the lessor's exemption claim is filed by February 15. Obtain BOE-263, *Lessors' Exemption Claim*, from the Assessor. Also include equipment on your premises held for lease or rent which you have used or intend to use. Report your cost and your selling price by year of acquisition.

LINE 4. BUILDINGS, BUILDING IMPROVEMENTS, AND/OR LEASEHOLD IMPROVEMENTS, LAND IMPROVEMENTS, LAND AND LAND DEVELOPMENT. Enter total from Schedule B, line 71 (see instructions for Schedule B).

LINE 5. CONSTRUCTION IN PROGRESS. If you have unallocated costs of construction in progress for improvements to land, machinery, equipment, furniture, buildings or other improvements, or leasehold improvements, attach an itemized listing. Include all tangible property, even though not entered on your books and records. Enter the total on PART II, line 5.

LINE 6. ALTERNATE OR IN-LIEU SCHEDULE. If the Assessor enclosed BOE-571-L, Alternate Schedule A, with this property statement, complete the alternate schedule as directed and report the total cost on line 6.

LINES 7-8. OTHER. Describe and report the cost of tangible property not reported elsewhere on this form.

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.

- 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).
- 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.

BOE-571-L (P7) REV. 21 (05-15)

Craneways Elevators

structure)

building)

Store fronts

Segregate the buildings and building or leasehold improvements into the two requested categories (items which have dual function will be classified according to their primary function). Examples of some property items and their most common categorization are listed below:

industry, or profession.

Air conditioning (process cooling)

Boilers (manufacturing process)

EXAMPLES OF STRUCTURE ITEMS, Column 1

EXAMPLES OF FIXTURE ITEMS, Column 2

An improvement will be classified as a fixture if its use or purpose

directly applies to or augments the process or function of a trade,

An improvement will be classified as a structure when its primary use or purpose is for housing or accommodation of personnel, personalty, or fixtures and has no direct application to the process or function of a trade, industry, or profession.

Air conditioning (except process cooling) Burglar alarm systems Conveyors (to move materials and products) Boilers (except manufacturing process) Central heating & cooling plants Cranes — traveling Environmental control devices (used in production process) Fans & ducts (used for processing) Environmental control devices (if an integral part of the Floors, raised computer rooms Furnaces, process Fans & ducts (part of an air circulation system for the Ice dispensers, coin operated Machinery fdns. & pits (not part of normal flooring fdns.) Fire alarm systems Permanent partitions (less than floor to ceiling) Pipelines, pipe supports, pumps used in the production process Partitions (floor to ceiling) Pipelines, pipe supports & pumps used to operate the Pits used as clarifiers, skimmers, sumps & for greasing in the trade facilities of a building or manufacturing process Plumbing — special purpose Pits not used in the trade or process Power wiring, switch gear & power panels used in mfg. process. Railroad spurs Refrigeration systems (not an integral part of the building) Refrigeration systems (integral part of the building) Refrigerators, walk-in unitized; including operating equipment Refrigerators, walk-in (excluding operating equipment) Restaurant equipment used in food & drink preparation or service which are an integral part of the building (plumbing fixtures, sinks, bars, soda fountains, booths & coun-Restaurants - rough plumbing to fixtures Safes - imbedded ters, garbage disposals, dishwashers, hoods, etc.) Signs which are an integral part of the building excluding Scales including platform & pit sign cabinet (face & lettering) Signs - all sign cabinets (face) & free standing signs including Silos or tanks when primarily used for storage or supports distribution Silos or tanks when primarily used for processing Sprinkler systems

LINE 69. If you have items reportable in Schedule B which were acquired in 1992 or previously, you must attach a separate schedule detailing the cost of such items by year(s) of acquisition. Enter the total cost of such items on line 69.

LINE 71. Add totals on line 70 and any additional schedules. Enter the same figure on PART II, line 4 that you entered in the box.

LINE 72. Report tenant improvements for which you received allowances during this reporting period that are not reported on Schedule B

DECLARATION BY ASSESSEE

Television & radio antenna towers

The law requires that this property statement, regardless of where it is executed, shall be declared to be true under penalty of perjury under the laws of the State of California. The declaration must be signed by the assessee, a duly appointed fiduciary, or a person authorized to sign on behalf of the assessee. In the case of a corporation, the declaration 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 the declaration on behalf of the corporation. In the case of a partnership, the declaration must be signed by a partner or an authorized employee or agent. In the case of a Limited Liability Company (LLC), the declaration must be signed by an LLC manager, or by a member where there is no manager, or by an employee or agent designated by the LLC manager or by the members to sign on behalf of the LLC.

When signed by an employee or agent, other than a member of the bar, a certified public accountant, a public accountant, an enrolled agent or a duly appointed fiduciary, the assessee's written authorization of the employee or agent to sign the declaration on behalf of the assessee must be filed with the Assessor. The Assessor may at any time require a person who signs a property statement and who is required to have written authorization to provide proof of authorization.

A property statement that is not signed and executed in accordance with the foregoing instructions is not validly filed. The penalty imposed by section 463 of the Revenue and Taxation Code for failure to file is applicable to unsigned property statements.

FORM 571-D SUPPLEMENTAL SCHEDULE

BOE-571-D (P1) REV. 17 (05-15)

SUPPLEMENTAL SCHEDULE FOR REPORTING MONTHLY ACQUISITIONS AND DISPOSALS OF PROPERTY REPORTED ON SCHEDULE B OF THE BUSINESS PROPERTY STATEMENT

OWNER NAME

MAILING ADDRESS

LOCATION OF PROPERTY

INSTRUCTIONS

Report all acquisitions and disposals reported in Columns 1, 2, 3, or 4 on Schedule B for the period January 1, 2015 through December 31, 2015. Indicate the applicable column number in the space provided.

ADDITIONS — Describe and enter the total acquisition cost(s), including excise, sales, and use taxes, freight-in, and installation charges, by month of acquisition; transfers-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 functional of/or operational, otherwise it should be reported as construction-in-progress).

Identify completed construction that was reported as construction-in-progress on your 2015 property statement. Describe the item(s) and cost(s), as previously reported, on a separate schedule and attach to BOE-57 D.

DISPOSALS — Information on this property should include the disposal date, method t diposal (transfer, scrapped, abandoned, sold, etc.) and names and addresses of purchasers when items are either solution insferred.

		ADDITIONS					DISPOSALS	
FROM COLUMN NUMBER	ENTER MONTH & YEAR OF ACQUISITION	DESCRIPTION	COST	FROM COLUMN UMBER	TER MONTH SEE AR OF DISPOSAL	YEAR ACQUIRED	DESCRIPTION	COST
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THIS STATEMENT SUBJECT TO AUDIT

BOE-571-D (P2) REV. 17 (05-15)



FORM 571-L ALTERNATE SCHEDULE A

For Bank, Insurance Company, or Financial Corporation Fixtures

BOE-571-LA (P1) REV. 19 (05-15)

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



THIS STATEMENT SUBJECT TO AUDIT

BOE-571-LA (P2) REV. 19 (05-15)

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 corportion, and personal property owned by an insurance company, are exempt from property tax assessment. However, fixtures are taxalle and must be reported on this schedule. Report the cost of your fixtures by calendar year of acquisition in the column that best describe the fixture. 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 BQE-571-L.

To facilitate your reporting, below is a list of typical fixtures. Note that some items make capitalized as personal property on your records, but must be reported as fixtures on this schedule. If additional information is needed, heave 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 ac usiting, and descriptive code ("C" for Carpets, "DR" for Drapes, "V" for Vault Door, "N" for Night Depository, "D" for Drive-up Window, "W" for Valk-up Window, and "K" for Kiosk.) If carpets and drapes were acquired in the same year, please attach a separate schedule light be year acquisition and the individual costs.

COLUMN 4. ATMs that are installed as free standing or counter-up noits 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 Hand took potent 504, page 18.)

REFERENCE LIST

LIST OF TYPICAL FIXTURES TO BE REPORTED IN COLUMN 1

Auditorium equipment (seating-tage 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

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

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Local Telephone Number (E-Mail Addiess	()	Fax Numbe	r()		2	the total number of units fo	r the location listed. o you live in one of the units?
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Enter name and telephone r	number of authorized pers	con to contact at location of	accounting records:			' liability company, etc.) ac	quire a " controlling interest" (see
						instructions for definition)	in this business entity?
CAREFULLY READ AND F	OLLOW THE ACCOMPA	WYING INSTRUCTIONS.		$ \rightarrow $	(2)	IFYES, did this business	entity also own "real property" (see
1. lí you no longer own	this property as of Janua	ry 1 of this year, show the n	name and mailing addre	ss of the revealence:		instructions for definition)	in California at the time of acouisition?
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BOE-571-R (P2) REV. 18 (05-15)

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.

SCHEDU	LE A	(include items in	storage; do not inclu	de built-ins)	SCHEDU	ILE B	(office, lobby, laundr	ry, pool, vending. si	gns, fire extinguisher
	Origin	al Installed Cost	FOR ASSESSO	R'S USE ONLY		Oninin	al Installed Cost	FOR ASSES	SOR'S USE ONLY
Year of Acquisition	(NOT dep	preciated book value)	Factor	Value	Year of Acquisition	(NOT dep	preciated book value)	Factor	Value
2015					2015				
2014					2014				
2013					2013				
2012					2012				
2011					2011		•		
2010					2010				
2009					2009				
2008					2008				
2007					2007				
2006					2006		·		
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a prior									
TOTAL COST Enter on line 8, p	5 — — — — — — — — — — — — — — — — — — —				enter on lin 9,	T \$, page 1.	<u> </u>		
REMARKS:							·		•
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INSTRUCTIONS

The Revenue and Taxation Code of the State of California requires that every person, upon request of the Assessor, shall file a written property statement under penalty of perjury with the Assessor within such time as the Assessor may appoint. Please complete this form according to the numbered instructions provided below as your statement of furnishings and related equipment owned, possessed or controlled by you as of 12:01 a.m., January 1, this year at the location listed. Property which you are purchasing under a conditional sales contract must be included. **Return the completed statement form to the Assessor on or before the date stated in the official requirement section.** In all instances, you must return the original BOE-671-R.

LINE 3. PROPERTY TRANSFER

Real Property – For purposes of reporting a change in control, real property includes land, structures, or fixtures owned or held under lease from (1) a private owner if the remaining term of the lease exceeds 35 years, including written renewal options, (2) a public owner (any arm or agency of local, state, or federal government) for any term or (3) mineral rights owned or held on lease for any term, whether in production or not.

Controlling Interest – When any person or legal entity obtains more than 50 percent of the voting stock of a corporation, or more than a 50 percent ownership interest in any other type of legal entity. The interest obtained includes what is acquired directly or indirectly by a parent or affiliated entity.

Forms, Filing Requirements & Penalty Information – Contact the Legal Entity Ownership Program Section at 916-274-3410 or refer to the Board's website at www.boe.ca.gov to obtain form BOE-100-B, applicable filing requirements, and penalty information.

- LINE 4. Check the appropriate box. If yes is checked, enter the name and address of the owner of the furniture or equipment. Briefly describe the nature of the business or property. Do not report household furnishings owned by tenants and used in their living quarters, or other personal property owned or controlled by tenants.
- LINE 5. Check the appropriate box. If yes is checked, enter the name and address of the owner or lessor and the quantity and description of the furniture or equipment. The lessor of the items will be asked to declare them.
- LINE 6. Enter the number of fully furnished, partly furnished, and unfurnished units in the appropriate column or columns. If the owner of the building (other than a corporation) occupies a unit as his living quarters, do not include it. Please indicate in the REMARKS area the items contained in a typical PARTLY FURNISHED apartment of each size. A sleeping room is a room with no kitchen facilities; a studio contains a kitchen and a convertible living room; a 1 bedrm. contains a bedroom, living room, kitchen, etc. Attach additional sheets if necessary.
- LINE 7. Enter the cost of supplies that are on hand at 12:01 a.m. on January 1 of this year. Include janitorial and pool supplies, whether carried in your asset accounts or expensed.

LINES 8 and 9. Enter the total cost from Schedules A and B.

- SCHEDULE A. Complete the schedule as instructed. If a portion of the furniture used in your rental units has been placed in storage, include the cost in the schedule and enter in the remarks the address where stored. Do not include built-in appliances, installed carpeting, or drapes as furniture; such items are considered part of the building. Include ranges, refrigerators, dishwashers, etc., if not built-in.
- SCHEDULE B. Complete the schedule as instructed. Include all equipment not reported in Schedule A. If you care to attach a schedule listing types of equipment separately, you may do so.

DECLARATION BY ASSESSEE

The law requires that this property statement, regardless of where it is executed, shall be declared to be true under penalty of perjury under the laws of the State of California. The declaration must be signed by the assessee, a duly appointed fiduciary, or a person authorized to sign on behalf of the assessee. In the case of a **corporation**, the declaration 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 the declaration on behalf of the corporation. In the case of a **partnership**, the declaration must be signed by a partner or an authorized employee or agent. In the case of a **Limited Liability Company** (LLC), the declaration must be signed by an LLC manager, or by a member where there is no manager, or by an employee or agent designated by the LLC manager or by the members to sign on behalf of the LLC.

When signed by an employee or agent, other than a member of the bar, a certified public accountant, a public accountant, an enrolled agent or a duly appointed fiduciary, the assessee's written authorization of the employee or agent to sign the declaration on behalf of the assessee must be filed with the Assessor. The Assessor may at any time require a person who signs a property statement and who is required to have written authorization to provide proof of authorization.

A property statement that is not signed and executed in accordance with the foregoing instructions is not validly filed. The penalty imposed by section 463 of the Revenue and Taxation Code for failure to file is applicable to unsigned property statements.

THIS STATEMENT IS NOT A PUBLIC DOCUMENT. THE INFORMATION DECLARED WILL BE HELD SECRET BY THE ASSESSOR.

NEW BUSINESS REGISTRATION FORM

CARMEN C Assessor-Rec	HU CORDER	LUD COUNTROL WAR	OFFICE O	SAN FRANCISCO F THE ASSESSOR-RECORD
	New Busi	ness Registra	ation Form	
Instructions: New b Property Division. C provided at the botto	ousinesses must registe omplete this form and s om of this Form.	r with the Office of ubmit it via mail, fa	the Assessor-Reco x, or e-mail using t	order, Business Personal he contact information
Owner's Legal Nam	e:(Corporations must report	their full corporate name	e.)	
Type of Ownership:	Sole Proprietorship	Partnership	Corporation	Other:
Business Name (DE	BA):			
Type of Business:	Retail	Wholesale	Manufacturer	Service/Professional
Business Account N	lumber (BAN):			•
	(From your	business certificate pro	wided by the Office of the	he Treasurer & Tax Collector.)
Business Location:		En	ctive Date of Curr	ent Location:
Mailing Address:		X		
Did you move from a	another location within th	he Con and Count	of Con Francisco'	
			of San Francisco	Yes No
If yes, indic	cate previous address		Effectiv	e Date:
If yes, indic Number of additiona	cate previous address al active business locatio	onswithin the City a	and County of San	? Yes No re Date: Francisco:
If yes, indic Number of additiona Please list your add	cate previous address al active business location itional active business location	ons within the City a	Effectiv	Yes No e Date: Francisco:
If yes, indic Number of additiona Please list your add 1. Busine	cate previous address al active business locatio itional active business lo ess Location:	one within the City a pocations:	and County of San	Yes No re Date:
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REQUEST FOR ADDRESS AND OTHER CHANGES FORM

CARM ASSESSO	IEN CHU R-RECORDER	TO TASE O DITATION	OFFICE OF	SAN FRANCISCO THE ASSESSOR-RECORD
	Requ	uest for Business Accou	Int Update	
Instructions: (business.	complete and return this	s Form to the Office of the Assess	or-Recorder to repo	rt changes to your
Business In	formation			
Assessor's Acc	ount Number:	Τ	oday's Date:	
Owner's Legal	Name: (Corporations mu	st report their full corporate name.)		
Business Name	e (DBA):			
Business Acco	unt Number (BAN):			▶
	(Fro	m your business certificate provided b	y the Office of the real	asure & Tax Collector.)
Business A	ccount Update Inf	formation		
Please check th	ne appropriate box(es) l	below and provide the previous ar	nd how business info	ormation.
Change	in Ownership		Effective Date:	
Previous	Owner's Legal Name: _	\		
New Own	er's Legal Name:	X		
From: To:	Sole Proprietorship Sole Proprietorship	Partnership Corporation Partnership Corporation	Other: Other:	
Did your f	ederal employer identif	ication number charge?	Yes No	
Business	Name (DBA) Chan		Effective Date:	
Previ	ous Name:	New Na	me:	
Business	Location Compge	X	Effective Date:	
Previ	ous Location	•		
New	Location:			
Mailing A	dress Change		Effective Date:	
Previ	ous Address:			
New	Address:			
Contact Info	ormation			
Contact Name:		Title:		
Phone Number	:	Email Ad	dress:	
I CERTIFY UN AND ALL INFOR	DER PENALTY OF PERJ MATION HEREON, INCL AND COMP	JURY UNDER THE LAWS OF THE S UDING ANY ACCOMPANYING STA LETE TO THE BEST OF MY KNOWL	TATE OF CALIFORNIA TEMENTS OR DOCUT EDGE AND BELIEF.	A THAT THE FOREGOING MENTS IS TRUE, CORRECT,
Sign	ature	Printed Name		Date Signed
	Business Pe Tel: (ersonal Property: 1155 Market Str San Francisco, CA 94103 (415) 554-5531 Fax: (415) 554-	eet, 5 th Floor 5544	

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

	AND COUNTRO	SAN FRANCISCO
Assessor-Recorder		OFFICE OF THE ASSESSOR-RECORI
Request for Copies of	Property Statements (57	71-L) and Other Documents
Instructions: The Assessor's records a signature. Therefore, please fill out this name, the mailing address, and the loc listed at the bottom of this Form. If you required to be submitted with this Form	are confidential in nature and requ s Form and include your account n ation of the property. Return this F are an agent of a taxpayer, an aut n.	ests require verification of the authorized umber, the owner's legal name, the DBA orm to the address, email, or fax number horization letter from the business owner is
Business Information		
Assessor's Account Number:	Business A	ccount Number (BAN)*:
Owner's Legal Name:	st report their full corporate name)	
Business Name (DBA):	st report their full corporate frame.)	×
Business Location:		
Mailing Address:		
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Documents Requested		
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