Transferring Real Estate Into Your Trust

# Deeds

In order to transfer your house to a trust, a deed must be filled out that lists the trustee or the trustees as the new owners of the house. You will need a copy of your current deed to obtain the legal description of the property and other required information. In California, a grant deed is usually the preferred deed to use. However, a quitclaim deed can be used is special situations. In other states, a warranty or quit claim deed is used for the purpose of transferring your house (real estate) into your trust.

# Preliminary Change of Ownership Form

A preliminary change of ownership form is required to be filed along with the deed. The form is generally available from the particular county recorder’s office website. Usually, when transfers or sales of property are recorded with the county recorder, whoever records the deed also files

a *Preliminary Change In Ownership Report (PCOR)* for the owner. It is a questionnaire requesting information on the property, principals involved in the transfer, type of transfer, purchase price and terms of sale, if applicable, and other relevant data.

Your deed must be notarized and filed with the local county recorder/clerk’s office, in some counties it may be the same as the Assessor’s Office.

If not included with this package, deed forms are generally available for free from your local county’s website or county library; as an example; Sacramento Public Law Library at: [http://saclaw.org](http://saclaw.org/) has deeds and other legal forms.