



COUNTY OF SAN LUIS OBISPO
OFFICE OF THE CLERK-RECORDER

Elaina Cano - County Clerk-Recorder
Melanie Foster - Deputy Director Clerk-Recorder

2017 SB2 Exemption Worksheet

The 2017 SB2 imposes a State mandate on County Recorders to charge an additional \$75.00 fee at the time of recording for every real estate instrument permitted by law to be recorded.

The bill contains five (5) exemptions. If any apply to your document title **and are declared**, the Recorder’s office will not charge the \$75.00 fee. The following questions are designed to help determine whether an exemption applies. *If you answer “yes” to any of the questions below, you may claim an exemption for that document title.* Exemptions must be stated on the face of each document (example below provided) or on a document cover page (Additional \$3.00/page fee applies).

YES NO

- Is the document subject to Documentary Transfer Tax?**

- Is the document recorded in connection with another document that was subject to Documentary Transfer Tax (DTT), and reference the same party(s) and property(s)?** (Note: “in connection with” means “as a direct result of, or otherwise necessary for”).

- Does the document transfer real property that is an owner-occupied residential dwelling?**
 - Is the property a residential property, and is the property or will the property become your primary residence?

- Is the document recorded in connection with a transfer of real property that is an owner-occupied residential dwelling, and reference the same party(s) and property(s)?**

- Is the document NOT related to real property?**

- For this transaction, do you have three (3) document titles subject to the SB2 fee?**
If yes, the fourth and any additional titles are exempt if declared. (The fee is capped at \$225.00 per single transaction)

*****Failure to declare any exemption will result in the imposition of the SB2 \$75.00 Fee*****