



A deed transfers interest in real estate into your trust. Follow these steps to execute and record your document properly.

**Complete the Preliminary Change of Ownership Report (PCOR).**

*(all California deeds require this form; other states or specific counties may have their own unique reporting forms)*

- These reporting forms must be dated and signed but should not be notarized.
- Note that the second page of the PCOR is intentionally left mostly blank, but you must still date and sign at the bottom.

**Sign and date the deed in the presence of a notary.**

*(the notary will verify your identity; you generally sign the first page and they notarize the second)*

**Mail or deliver your documents to the County Recorder.**

*(you can use the provided envelope to mail them or walk them in to the recorder's office in person)*

- If you have multiple deeds, you can send them all in a single envelope with one check.

**Include a "Not to Exceed" check for the recording fee.**

*(this is the simplest way to handle fees because exact amounts often fluctuate)*

- **How it works:** Write the check to the County Recorder. Leave the amount line blank, but write "Not to exceed [Amount]" in the memo line. The bank will only honor up to your stated limit.
- **For a primary residence:** Set the limit to **\$50**.
- **For non-primary residences (California only):** Set the limit to **\$125**.

**Confirm your recording was successful.**

*(the county will return the deed with a barcode sticker when finished; ignore any third-party offers to buy deed copies)*