

# INTRODUCTION TO DOCUMENTS.

FOR CALIFORNIA



PACIFIC COAST  
TITLE COMPANY

TOOLS, SERVICE, COMMITMENT

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The title insurance industry is dependent on numerous types of public records, which include recorded legal documents that are generated in grantor/grantee indexes, lot books, and computers. These records reflect matters affecting title to or interests in real property.

This manual is designed to acquaint you with some of the commonly encountered legal documents recorded on the public record. Although the examples that are shown cover only basic essentials, they will assist you in acquiring a greater understanding of the title insurance business.

The sample legal documents contained herein are solely intended for study purposes and should never be used as “models” to create other legal documents. Recorded documents substantiate matters involving individuals and legal entities when dealing with interests in real property and have significant legal and tax ramifications. Individuals are strongly advised to seek appropriate legal and tax advice before executing documents for recording.

Each item within the legal documents is explained and illustrated as to purpose, content, and usage. For discussion purposes, the commentary displayed in numerical order on each legal document is defined on the right, while the corresponding numeral is displayed on the sample document at left.

SPECIAL NOTE: This “Introduction to Documents” manual is intended for training purposes only. It is not to be used for interpreting the full legal effect of the documents shown herein.

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# GRANT DEED

## 4 Pacific Coast Title Company

Order No: 10012345  
Escrow No.: 10012345  
Loan No:

WHEN RECORDED MAIL TO:

**Jon Jones**  
123 Success Ave  
Los Angeles, CA 90001

**1 123456**

Recorded in Official Records  
of Los Angeles County, CA **2**  
July 10th, 8:30am  
Daniel Cormier, County Recorder

6 MAIL TAX STATEMENTS TO:

SAME

APN 0000-12-02314

SPACE ABOVE THIS LINE FOR RECORDER'S USE  
DOCUMENTARY TRANSFER TAX \$ **3 \$110.00**

Computed on the consideration or value of property conveyed; OR  
 Computed on the consideration or value less liens or encumbrances  
remaining at time of sale.

*Daniel Cormier*

Signature of Declarant or Agent determining tax - Firm Name

## GRANT DEED

8 FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged, **7**

Dana E. Seller, A Widower  
hereby GRANT(S) to **9**

**10** Jon Jones, Purchaser and Shawna Jones, Purchaser, Husband and Wife, As Joint Tenants  
the real property in the State of California, County of Los Angeles, City of Los Angeles described as

**11** LOT 17, TRACT NO. 16932, AS PER MAP RECORDED IN BOOK 284, PAGES 1 TO 3, INCLUSIVE,  
OF MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY.

Dated July 10, 2013

**12**

*Dana W. Seller*

Dana E. Seller **13**

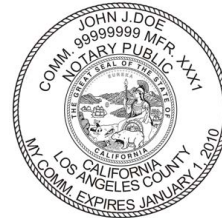
STATE OF CALIFORNIA )  
)ss.

COUNTY OF Los Angeles )

On July 10, 2013 before me, John Doe, Notary Public personally appeared  
Dana E. Seller, AND No One Else personally known to me  
(or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within  
instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by  
his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the  
instrument.

WITNESS my hand and official seal.

Signature John Doe



(This area for official notarial seal)

MAIL TAX STATEMENTS AS DIRECTED ABOVE

# GRANT DEED

A deed is a written instrument by which title to or an interest in real property is transferred from an individual or legal entity (the grantor) to another (the grantee). There are basically two kinds of deeds in general use in California. The Grant Deed, which will be discussed here, and the Quitclaim Deed, of which numerous types exist. The primary difference between the Grant Deed and the Quitclaim Deed lies in the operative words of conveyance if any warranties are being conveyed. The word “Grants” (see item 9 below) is expressly designated by statute in the Grant Deed, whereas, the operative words of conveyance, “remise, release and forever quitclaim” are associated with Quitclaim Deed types. The important parts of a Grant Deed are discussed below and are shown by matching numerical symbols on the sample page, opposite. This same format will be followed on each succeeding document.

- 1** Recording Information: The date and time of recordation; document or instrument number, and/or the book and page(s) of the official records are assigned and noted by the county recorder in order to establish the recording reference.
- 2** County Recorder’s Stamps: The large stamp reflects the recording reference of the document and indicates the name of the county and county recorder. The smaller stamp shows the recording fees.
- 3** Documentary Transfer Tax: This is a tax levied on the sale of the property by the county (and sometimes the city) where the property is located.
- 4** Recording Requested By: This identifies the party requesting that the document to be recorded. The names of title companies are often represented when groups of documents are submitted to the county for recording.
- 5** And When Recorded Mail To: After recording, the document will be mailed by the county to the addressee shown in this section.
- 6** Tax Statement Address: This is the part (and address) to whom statements regarding real property taxes will be mailed by the county tax office. It is usually the same party mentioned in the “And When Recorded Mail To” section (item 5). If so, there is no need to complete the section in this form, but anytime the tax statements are to be mailed elsewhere, then the appropriate information must be inserted.
- 7** For Valuable Consideration: This is a statement which reflects the fact that money or some legal consideration is being given in exchange for the real property.
- 8** Grantor: This identifies the party(ies) selling or transferring the real property.
- 9** Operative Words of Conveyance: Wording in this section is essential to present an intent to transfer the title to the real property. In the Grant Deed, the wording “hereby grant(s)” is used.
- 10** Grantee: This identifies the party(ies) purchasing or receiving the real property, the status (e.g. husband and wife) and the method of acquiring title (e.g. joint tenants), that compliments the vesting.
- 11** Legal Description: This legally describes the real property, either by proportionate interest or in its entirety.
- 12** Date of Execution: Generally, this is the date on which the document is executed (signed), which is often the equivalent date of preparation or drawing. Execution may take place after preparation or drawing, but never before.
- 13** Signature of the Grantor: The signature (execution) of the grantor (seller) will appear on the line in this section and his/her name should be printed or typed beneath the signature.

# GRANT DEED

## Pacific Coast Title Company

17

Order No: 10012345  
Escrow No.: 10012345  
Loan No:

123456

Recorded in Official Records  
of Los Angeles County, CA  
July 10th, 8:30am  
Daniel Cormier, County Recorder

When recorded mail to:  
**Jon Jones**  
123 Success Ave  
Los Angeles, CA 90001

SPACE ABOVE THIS LINE FOR RECORDER'S USE

MAIL TAX STATEMENTS TO:  
SAME

DOCUMENTARY TRANSFER TAX \$ \_\_\_\_\_  
[X] Computed on the consideration or value of property conveyed; OR  
[ ] Computed on the consideration or value less liens or encumbrances  
remaining at time of sale.

18

APN 0000-12-02314

*Daniel Cormier*

Signature of Declarant or Agent determining tax - Firm Name

## GRANT DEED

FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,  
Dana E. Seller, A Widower  
hereby GRANT(S) to

Jon Jones, Purchaser and Shawna Jones, Purchaser, Husband and Wife, As Joint Tenants  
the real property in the State of California, County of Los Angeles, City of Los Angeles described as

LOT 17, TRACT NO. 16932, AS PER MAP RECORDED IN BOOK 284, PAGES 1 TO 3, INCLUSIVE,  
OF MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY.

Dated July 10, 2013

*Dana W. Seller*

Dana E. Seller

STATE OF CALIFORNIA

15 )  
)ss.

COUNTY OF Los Angeles

On July 10, 2013 before me, John Doe, Notary Public

14

Dana E. Seller, AND No One Else personally appeared  
(or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within  
instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by  
his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the  
instrument.

WITNESS my hand and official seal.

Signature

*John Doe*



16

(This area for official notarial seal)

MAIL TAX STATEMENTS AS DIRECTED ABOVE

1002 (1/94)

**14** Acknowledgment: An acknowledgment is a formal declaration, made before an authorized official (usually a notary public), by the person who has executed (signed) a document, that such execution is his/her own act and capacity(ies). This declaration is then reduced to writing and attested to by said authorized official. In most instances, a document must be acknowledged ("notarized") before it can be accepted for recordation.

**15** Venue: This identifies the state and county where the acknowledgment is taken.

**16** Notary Seal or Stamp: In this space, the official seal of the notary public or other authorized official must be affixed or stamped.

**17** Title Order No. and Escrow No.: On this line the title company's order number will appear, along with the customer's escrow number, if the document was recorded as part of a title order which culminated in the closing of the escrow. These numbers are generated by the title/escrow companies to control order inventories.

**18** Assessor's Parcel Number (APN): In many countries as a prerequisite to recording, the tax assessor's parcel number must be contained on certain types of documents for real property identification purposes.

# INTERSPOUSAL TRANSFER GRANT DEED

**1** Escrow No.: 1002535  
Order No. 10025352-6

**2** WHEN RECORDED MAIL TO:  
Shawna Jones  
123 Success Ave.  
Los Angeles, CA 90001

**3** MAIL TAX STATEMENTS TO:  
  
Same As Above

**4** DOCUMENTARY TRANSFER TAX \$ -0-  
SPACE ABOVE THIS LINE FOR RECORDER'S USE  
 Computed on the consideration or value of property conveyed;  
 Computed on the consideration or value less liens or encumbrances remaining at time of sale; OR  
 Exempt from imposition of the Documentary Transfer Tax pursuant to Revenue and Taxation Code, Section 11927(a), on transferring community, quasi-community, or quasi-marital property assets between spouses, pursuant to a judgment, an order, or a written agreement between spouses in contemplation of any such judgment or order.

*John Jones*  
\_\_\_\_\_  
Signature of declaring grantor or grantee

## INTERSPOUSAL TRANSFER GRANT DEED

(Excluded from reappraisal under California Constitution, Article 13A, Section 1, et seq.)

**5** This is an Interspousal Transfer and not a change in ownership under Section 63 of the Revenue and Taxation Code and Grantor(s) has(have) checked the applicable exclusion from reappraisal:

- A transfer to a trustee for the beneficial use of a spouse, or the surviving spouse of a deceased transferor; or by a trustee of such a trust to the spouse of the trustor;
- A transfer to a spouse or former spouse in connection with a property settlement agreement or decree of dissolution of a marriage or legal separation;
- A creation, transfer, or termination, solely between spouses, of any co-owner's interest;
- The distribution of a legal entity's property to a spouse or former spouse in exchange for the interest of such spouse in the legal entity in connection with a property settlement agreement or a decree of dissolution of a marriage or legal separation;
- Other: \_\_\_\_\_

**Check when creating separate property interest in grantee spouse: It is the express intent of the grantor, being the spouse of the grantee, to convey all right, title and interest of the grantor, community or otherwise, in and to the herein described property to the grantee as his/her sole and separate property.**

**6** FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,  
Jon Jones

**8** hereby GRANT(S) to  
Shawna Jones

**7**

**9**

(continued on Page 2)  
MAIL TAX STATEMENTS AS DIRECTED ABOVE

# INTERPOUSAL TRANSFER GRANT DEED

A deed is a written instrument by which title to or an interest in real property is transferred from an individual or legal entity (the grantor) to another (the grantee). There are basically two kinds of deeds in general use in California. The Grant Deed, which will be discussed here, and the Quitclaim Deed, of which numerous types exist. The primary difference between the Grant Deed and the Quitclaim Deed lies in the operative words of conveyance if any warranties are being conveyed. The word "Grants" (see item 9 below) is expressly designated by statute in the Grant Deed, whereas, the operative words of conveyance, "remit, release and forever quitclaim" are associated with Quitclaim Deed types. The important parts of a Grant Deed are discussed below and are shown by matching numerical symbols on the sample page, opposite. This same format will be followed on each succeeding document.

**1** Title Order No. and Escrow No.: On this line the title company's order number will appear, along with the customer's escrow number, if the document was recorded as part of a title order which culminated in the closing of the escrow. These numbers are generated by the title/escrow companies to control order inventories.

**2** And When Recorded Mail To: After recording, the document will be mailed by the County to the addressee shown in this section.

**3** Mail Tax Statements To: After recording, the document will be mailed by the County to the addressee shown in this section (Normally the Grantee).

**4** Documentary Transfer Tax: This is a tax levied on the sale of the property by the County (and sometimes the city) where the property is located. Generally, this would not apply to the Quitclaim Deed, wherein consideration does not exceed \$100.00 or under marital relationships defined in the Revenue and Taxation Code Sections 11911 and 11927.

**5** Select the appropriate box that pertains to the situation.

**6** For Valuable Consideration: This is a statement which reflects the fact that money or some legal consideration is being given in exchange for the real property.

**7** Grantor: This identifies the party conveying all right, title and interest of the grantor, community or otherwise of the real property.

**8** Operative Words of Conveyance: Wording in this section is essential to present an intent to transfer the title to the real property.

**9** Grantee: This identifies the party purchasing or receiving the real property; the Status; and the method of acquiring title, that complements the vesting.

# INTERSPOUSAL TRANSFER GRANT DEED

10

the real property in the State of California, County of Los Angeles, City of Los Angeles, described as follows:

11

LOT 17, TRACT NO. 16932, AS PER MAP RECORDED IN BOOK 284, PAGES 1 TO 3, INCLUSIVE, OF MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY.

12

Dated: July 10, 2013

John Jones

14

Jon Jones

STATE OF CALIFORNIA }  
COUNTY OF Los Angeles }

13

John Doe, Notary Public  
before me,

On July 10, 2013  
John Doe, Notary Public,

15

personally appeared Jon Jones

personally known to me [or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the instrument.  
WITNESS my hand and official seal.

Signature John Doe



(This area for official notarial seal)



# INTERSPOUSAL TRANSFER GRANT DEED

**10** City and County that the property is located.,

**11** Legal Description: This legally describes the real property, either by proportionate interest or in its entirety.

**12** Date of Execution: Generally, this is the date on which the document is executed (signed), which is often the equivalent date of preparation or drawing. Execution may take place after preparation or drawing, but never before.

**13** Venue: This identifies the state and county where the acknowledgment is taken.

**14** Signature of the Grantor: The signature (execution) of the grantor (seller) will appear on the line in this section and his/her name should be printed or typed beneath the signature.

**15** Acknowledgment: is a formal declaration, made before an authorized official (usually a notary public), by the person who has executed (signed) a document, that such execution is his/her own act and capacity(ies). This declaration is then reduced to writing and attested to by said authorized official. In most instances, a recordation.

# QUITCLAIM DEED

Escrow No.: 1002535  
Order No. 10025352-6

WHEN RECORDED MAIL TO:

Shawna Jones  
123 Success Ave.  
Los Angeles, CA 90001

1

2

Recorded in Official Records  
of Los Angeles County, CA  
July 10th, 8:30am  
Daniel Cormier, County Recorder

MAIL TAX STATEMENTS TO:

3

SPACE ABOVE THIS LINE FOR RECORDER'S USE  
DOCUMENTARY TRANSFER TAX \$ Separate Property of a Spouse, R & T 11911  
 Computed on the consideration or value of property conveyed; OR  
 Computed on the consideration or value less liens or encumbrances  
remaining at time of sale.

15

APN 0000-12-02314

\_\_\_\_\_  
Signature of Declarant or Agent determining tax - Firm Name

## QUITCLAIM DEED

4

FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,  
Jon Jones Purchaser, A Married Man, Husband of the Grantee - Named Herein

5

6

do(es) hereby REMISE, RELEASE AND FOREVER QUITCLAIM to  
Shawna Jones Purchaser, A Married Women, As Her Sole and Separate Property

7

the real property in the State of California, County of Los Angeles, City of Los Angeles described as

8

LOT 17, TRACT NO. 16932, AS PER MAP RECORDED IN BOOK 284, PAGES 1 TO 3, INCLUSIVE,  
OF MAPS, IN THE OFFICE OF THE COUNTY RECORDER OF SAID COUNTY.

9

THIS DEED IS GIVEN TO CARRY OUT THE MUTUAL DESIRE AND AGREEMENT OF THE PARTIES  
HERETO, THAT SAID PROPERTY SHALL BECOME VESTED IN THE GRANTEE AS HER SOLE AND  
SEPARATE PROPERTY

10

Dated July 10, 2013

11

John Jones

\_\_\_\_\_  
Jon Jones  
\_\_\_\_\_  
\_\_\_\_\_

STATE OF CALIFORNIA )

13

) ss.

COUNTY OF Los Angeles )

12

On July 10, 2013 before me, John Doe, Notary Public

Jon Jones, Purchaser AND No One Else personally appeared  
(or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within  
instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by  
his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the  
instrument.

WITNESS my hand and official seal.

Signature John Doe

14



(This area for official notarial seal)

MAIL TAX STATEMENTS AS DIRECTED ABOVE

# QUITCLAIM DEED

This deed is used to convey any interest, held by the grantor, in the property described therein at the time. The Quitclaim Deed is normally used to release or abandon uncertain or unknown interests, or to relinquish any possible community property interest in real property.

- 1** Recording Information: The date and time of recordation; document or instrument number; and/or the book and page(s) of the official records are assigned and noted by the county recorder in order to establish the recording reference.
- 2** County Recorder's Stamps: The large stamp reflects the recording reference of the document and indicates the name of the county and county recorder. The smaller stamp shows the recording fees.
- 3** Documentary Transfer Tax: This is a tax levied on the sale of the property by the county (and sometimes the city) where the property is located. Generally, this would not apply to the Quitclaim Deed, wherein consideration does not exceed \$100.00 or under marital relationships defined in the Revenue and Taxation Code Sections 11911 and 11927.
- 4** For Valuable Consideration: This is a statement which reflects the fact that money or some legal consideration is being given in exchange for the real property.
- 5** Grantor: This identifies the party(ies) selling or transferring the real property.
- 6** Operative Words of Conveyance: Wording in this section is essential to present an intent to transfer the title to the real property. In the Quitclaim Deed, the wording "do(es) hereby remise, release and forever quitclaim" is used.
- 7** Grantee: This identifies the party(ies) purchasing or receiving the real property, the status (e.g. husband and wife) and the method of acquiring title (e.g. joint tenants), that compliments the vesting.
- 8** Legal Description: This legally describes the real property, either by proportionate interest or in its entirety.
- 9** Intent Recital: Quite often, in Quitclaim Deeds, a recital clarifying the intent or purpose of the executed document is contained therein.
- 10** Date of Execution: Generally, this is the date on which the document is executed (signed), which is often the equivalent date of preparation or drawing. Execution may take place after preparation or drawing, but never before.
- 11** Signature of the Grantor: The signature (execution) of the grantor (seller) will appear on the line in this section and his/her name should be printed or typed beneath the signature.
- 12** Acknowledgment: An acknowledgment is a formal declaration, made before an authorized official (usually a notary public), by the person who has executed (signed) a document, that such execution is his/her own act and capacity(ies). This declaration is then reduced to writing and attested to by said authorized official. In most instances, a document must be acknowledged ("notarized") before it can be accepted for recordation.
- 13** Venue: This identifies the state and county where the acknowledgment is taken.
- 14** Notary Seal or Stamp: In this space, the official seal of the notary public or other authorized official must be affixed or stamped.
- 15** Assessor's Parcel Number (APN): In many countries as a prerequisite to recording, the tax assessor's parcel number must be contained on certain types of documents for real property identification purposes.

