

# REALTY TRANSFER CERTIFICATE

**Confidential Tax Document:** The information contained in this certificate is confidential by Montana law. Unauthorized disclosure of this information is a criminal offense, [15-7-308, MCA](#).

GEOCODE(S) \_\_\_\_\_  
ASSESSMENT CODE: \_\_\_\_\_

The Department of Revenue will change the name on ownership records used for the assessment and taxation of real property when this form is fully completed and signed by the preparer. (Please read the attached instructions on page 1 for assistance in completing and filing this form.)

**Montana law requires this form be completed and may impose up to a \$500 penalty for failure to file a Realty Transfer Certificate (15-7-304, 15-7-305 and 15-7-310, MCA)**

## PART 1 -- DATE OF TRANSFER (SALE)

(MM/DD/YYYY)

## PART 2 -- PARTIES Please complete this section in full; if additional space is required, please attach a separate page

|  |   |   |
|--|---|---|
| <b>Seller (Grantor)</b><br>Name _____<br>Mailing Address _____<br>(Permanent)<br>City _____ ST _____ ZIP _____<br>Seller Principal Residence <input type="checkbox"/> Yes <input type="checkbox"/> No  | Enter the last 4 digits of the SSN or FEIN<br>SSN _____ - _____ - _____<br>SSN _____ - _____ - _____<br>FEIN _____ - _____ - _____<br>Daytime Phone _____<br>Email Address _____  | Main Geocode _____<br>Assessor Code or Parcel # _____ |
| <b>Buyer (Grantee)</b><br>Name _____<br>Mailing Address _____<br>(Permanent)<br>City _____ ST _____ ZIP _____<br>Buyer Principal Residence <input type="checkbox"/> Yes <input type="checkbox"/> No<br>Mailing Address _____<br>For Tax Notice<br>(If different) City _____ ST _____ ZIP _____ | SSN _____ - _____ - _____<br>SSN _____ - _____ - _____<br>FEIN _____ - _____ - _____<br>Daytime Phone _____<br>Email Address _____<br><br>Transfer to Trustee, Custodian, or other Representative:<br>Trust FEIN _____ - _____ - _____<br>Minor SSN _____ - _____ - _____ |   |

## PART 3 -- PROPERTY DESCRIPTION Please complete fully; if additional space is required, please attach a separate page.

Legal Description \_\_\_\_\_ Attachment   
Add/Sub \_\_\_\_\_ Block \_\_\_\_\_ Lot \_\_\_\_\_  
County \_\_\_\_\_ City/Town \_\_\_\_\_ Section \_\_\_\_\_ Township \_\_\_\_\_ Range \_\_\_\_\_

## PART 4 -- DESCRIPTION OF TRANSFER Please complete fully; more than one option may apply.

Sale  Gift  Barter  Nominal or no consideration  Part of 1031 or 1033 exchange  Transfer is subject to a reserved life estate  
Distressed sales:  Sheriff's deed  Trustee's deed  Deed in lieu of foreclosure  Short sale  Other

**Transfer by Operation of Law**  
 Termination of life estate by death  Termination of joint tenancy by death  Transfer on Death deed  
 Court order or decree (except sheriff's sale)  Merger, consolidation, or other business entity reorganization  Name change only

## PART 5 -- EXCEPTIONS FROM PROVIDING SALES PRICE INFORMATION Please complete fully, more than one may apply.

Transfer between husband/wife or parent/child for nominal consideration  Transfer made in contemplation of death without consideration  
 Termination of joint tenancy by death  Transfer of property of a decedent's estate  
 Transfer to a revocable living trust  Transfer pursuant to court decree (except sheriff's sale)  
 Gift  Termination of life estate by death  
 Correction, modification, or supplement of previously recorded instrument, no additional consideration  Transfer by government agency  
 Merger, consolidation, or reorganization of business entity  Tax deed  
 Land currently classified as agricultural land and for continued use for agricultural purposes ([15-7-307, MCA](#))  Land currently classified as forestland and for continued use for producing timber ([15-7-307, MCA](#))

## PART 6 -- SALE PRICE INFORMATION Please complete fully, more than one may apply.

Actual Sale Price \$ \_\_\_\_\_ Value of good will included in sale \$ \_\_\_\_\_  
Financing:  Cash  FHA  VA  Contract  Other  
Terms:  New loan OR  Assumption of existing loan  
Value of personal property included in sale \$ \_\_\_\_\_  
Value of inventory included in sale \$ \_\_\_\_\_  
Value of licenses included in sale \$ \_\_\_\_\_  
Was an SID payoff included in the sale price?  Yes  No  
Did the buyer assume an SID?  Yes  No  
Amount of SID paid or assumed: \$ \_\_\_\_\_  
Was a mobile home included in the sale?  Yes  No

## PART 7 -- WATER RIGHT DISCLOSURE Disclosure is only applicable to the property identified in PART 3 above.

A. Property is served by a public water supply, i.e., city, irrigation district, or water district provides water.  B. Seller has no water rights on record with DNRC to transfer.  C. Seller is transferring ALL water rights on record with DNRC to the Buyer.  D. Seller is dividing or exempting (reserving) water rights. Seller must file Water Right Update form.

Seller (Grantor) Signature \_\_\_\_\_ Date \_\_\_\_\_

## PART 8 -- PREPARER INFORMATION Preparer's signature is required.

Signature \_\_\_\_\_ Mailing Address \_\_\_\_\_  
Name/Title \_\_\_\_\_ (please print) City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Daytime Phone \_\_\_\_\_

## Clerk and Recorder Use Only

Recording Information: Document No. \_\_\_\_\_ Book \_\_\_\_\_ Page \_\_\_\_\_ Date \_\_\_\_\_  
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