

SB 2 - Atkins
California Government Code 27388.1
San Diego County Recorder's Office - Staff Training Tool

	A	B	C	D	E	F	G	H	I
1	Document(s)	# of SB2 Transactions ¹	# of Titles	DTT Paid	# of Parcels	Fee Amount	Exempt Y/N	Exempt Reason Needed from Submitter	Notes
2	Abstract of Judgment - Single document, single transaction	1	1	N	N/A	\$75	N	N	\$75 fee applies per title
3	Abstract of Judgment - Four (4) separate documents presented at same time	4	1	N	N/A	\$300	N	N	Considered four (4) separate SB 2 transactions, \$225 cap does not apply
4	Acknowledgment of Satisfaction of Judgment Full with one (1) prior recording reference (PRR) and one (1) parcel	1	1	N	1	\$75	N	N	Document may not list number of parcels, treat as one if not listed
5	Acknowledgment of Satisfaction of Judgment (full or partial) with 2 prior recording references (PRR)	1	1	N	N/A	\$75	N	N	Considered one (1) SB 2 transaction
6	Acknowledgment of Partial Satisfaction of Judgment with one (1) PRR and multiple parcels	1	1	N	5	\$225	N	N	Considered one (1) SB 2 transaction with multiple parcels, \$75 per parcel, \$225 cap applies for each transaction. \$225 cap reached. Document may not list number of parcels, treat as one if not listed.

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7	Acknowledgment of Satisfaction (full or partial) of Judgment with multiple PRR and with two (2) parcels listed	1	1	N	2	\$150	N	N	Considered one (1) SB 2 transaction with two (2) parcels. \$75 per parcel, \$225 cap would apply if more than three (3) parcels. Number of parcels may not be listed, treat as one if not listed.
8	Addendum to Notice of Assessment, Discharge Payment of Contractual Assessment - one document with two titles, 110 PRR, 110 parcels (eg., WRCOG)	1	2	N	110	\$225	N	N	Considered one (1) SB 2 transaction with each one having two titles (treat as 1 Addendum and 1 Release) 110 parcels for each title, \$225 cap applies. \$225 cap reached.
9	Affidavit of Death of Trustee, Deed (Inheritance) - Receiver of property will <u>not occupy</u> as an owner-occupier. No DTT was paid.	1	2	N	1	\$150	N	N	
10	Affidavit of Death with two (2) separate decedent's Death Certificates with remaining owner-occupier	1	2	N	1	\$0	Y	Y	

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11	Affidavit of Death with two (2) separate decedent's Death Certificates with two (2) parcels and a remaining owner-occupier of a residential dwelling	1	2	N	2	\$150	Y/N	Y/N	Considered one (1) SB 2 transaction with two (2) parcels. Unless specified by submitter, only one (1) parcel is exempt as owner-occupier. If there are more than 3 parcels the \$225 cap applies. Exemption reason needed for all documents claiming exemption.
12	Affidavit of Death with two (2) separate decedent's Death Certificates with five (5) parcels and a remaining owner-occupier of a residential dwelling	1	2	N	5	\$225	Y/N	Y/N	Considered one (1) SB 2 transaction with five (5) parcels. Unless specified by submitter, only one (1) parcel is exempt as owner-occupier. \$225 cap applies. \$225 cap reached. Exemption reason needed for all documents claiming exemption.
13	Affidavit of Death with two (2) separate decedent's Death Certificates with one (1) parcel with a remaining owner not owner-occupier	1	2	N	1	\$150	N	N	Considered one (1) SB 2 transaction with two (2) titles with one (1) parcel on each.
14	Affidavit of Death with two (2) separate decedent's Death Certificates with five (5) parcels with a remaining owner not owner-occupier	1	2	N	5	\$225	N	N	Considered one (1) SB 2 transaction with five (5) parcels. \$225 cap applies. \$225 cap reached.
15	Affidavit of Death, Deed, Deed of Trust (DTT paid)	1	3	Y	1	\$0	Y	Y	Exemption reason needed for all documents except Deed.

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16	Affidavit of Successor Trustee - owner-occupier	1	1	N	1	\$0	Y	Y	
17	Affidavit of Successor Trustee - not owner-occupier	1	1	N	1	\$75	N	N	
18	Assessment Map (Boundary/Diagram)	1	1	N	20	\$225	N	N	Considered one (1) SB 2 transaction with multiple parcels. \$225 cap applies. \$225 cap reached.
19	Assignment and Assumption of Deed of Trust in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	2	Y	N/A	\$0	Y	Y	
20	Assignment of Deed of Trust - one (1) document one (1) PRR	1	1	N	1	\$75	N	N	
21	Assignment of Deed of Trust - one (1) document fifteen (15) PRR	1	1	N	1	\$75	N	N	Considered one (1) SB 2 transaction (Blanket Rule applies, one title with additional indexing for the number of PRR's)
22	Correction Deed - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	1	Y	1	\$0	Y	Y	
23	Correction Deed - no exemption claimed	1	1	N	1	\$75	N	N	

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24	Covenants, Conditions, and Restrictions - number of parcels not specified	1	1	N	N/A	\$75	N	N	Considered one (1) SB 2 transaction.
25	Covenants, Conditions, and Restrictions - multiple parcels listed	1	1	N	400	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per parcel. \$225 cap applies. \$225 cap reached.
26	Covenants, Conditions, and Restrictions, with a Subordination Agreement - number of parcels not specified	1	2	N	N/A	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
27	Covenants, Conditions, and Restrictions, with a Subordination Agreement - multiple parcels listed	1	2	N	400	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per parcel. \$225 cap applies. \$225 cap reached.
28	Deed - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	1	Y	1	\$0	Y	Y	
29	Deed - with one or more parcels where DTT was paid	1	1	Y	3	\$0	Y	N	
30	Deed - with multiple parcels in connection with a transfer of an owner-occupier residential dwelling	1	1	Y	3	\$150	Y	Y	Considered one (1) SB 2 transaction with three (3) parcels. Unless specified by submitter, only one (1) parcel is exempt as owner-occupier can only occupy one parcel. \$75 fee per parcel.

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31	Deed - not in connection with a transfer of an owner-occupier residential dwelling. or no DTT was paid	1	1	N	1	\$75	N	N	
32	Deed - with two (2) parcels - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	1	N	2	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per parcel.
33	Deed - with four (4) or more parcels - not in connection with a transfer of an owner-occupier residential dwelling. or no DTT was paid	1	1	N	4	\$225	N	N	\$75 fee applies per parcel. \$225 cap applies. \$225 cap reached.
34	Deed of Trust, Assignment of Leases, Assignment of Rents, & Security Agreement - one (1) document with four (4) titles	1	4	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Fee only applies to the first three (3) titles, 4th title would be exempt \$225 cap applies. \$225 cap reached.
35	Deed of Trust, Request for Notice - one (1) document with two (2) titles	1	2	N	1	\$150	N	N	May be recorded for a refinance.
36	Deed of Trust, Subordination Agreement, Quitclaim Deed - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	3	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.

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37	Deed of Trust, Subordination Agreement, Quitclaim Deed - in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	3	N	1	\$0	Y	Y	Considered one (1) SB 2 transaction. \$75 fee per title.
38	Deed, Declaration of Homestead - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	2	Y	1	\$0	Y	Y	Should only receive these documents when there is an owner-occupier
39	Deed, Deed of Trust & Request for Notice of Default - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	3	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
40	Deed, Deed of Trust & Request for Notice of Default -in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	Y	1	\$0	Y	Y	
41	Deed, Deed of Trust, Assignment of Rents & Request for Notice of Default - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	4	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Fee only applies to the first three (3) titles, 4th title would be exempt \$225 cap reached

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42	Deed, Deed of Trust, Assignment of Rents & Request for Notice of Default - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	4	Y	1	\$0	Y	Y	
43	Deed, Deed of Trust, Deed - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	Y	1	\$0	Y	Y	Usually in connection with refinance where the property is going in and out of a trust for owner-occupied residential dwelling
44	Deed, Deed of Trust, Deed - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	3	N	1	\$225	N	N	Usually in connection with refinance where the real property is moving in and out of a trust that is not owner-occupied. \$225 cap would apply if more than 3 titles.
45	Deed, Deed of Trust, Power of Attorney - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	N	1	\$0	Y	Y	
46	Deed, Deed of Trust, Power of Attorney - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	3	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. \$225 cap would apply if more than 3 titles.

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47	Government Release - one (1) document with one (1) PRR	1	1	N	1	\$75	N	N	
48	Government Release - one (1) document with five (5) PRR	5	1	N	1	\$375	N	N	Considered five (5) SB 2 transactions. \$75 fee applies for each transaction. \$225 cap does not apply.
49	Grant of Lien/Family Law Attorney's Real Property Lien	1	1	N	1	\$75	N	N	Would not be exempt, not recorded in connection with a transfer.
50	Lease (Including Memorandum of Lease, Assignment of Lease, and additional types of Leases +/- 35 years) - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	1	Y	1	\$0	Y	Y	Would require further research to determine if it is an owner-occupier of a residential dwelling, also if DTT is/is not paid.
51	Lease (Including Memorandum of Lease, Assignment of Lease, and additional types of Leases +/- 35 years) - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	1	N	1	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. \$225 cap would apply if more than 3 titles.

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52	Letters of Administration/Letters Testamentary, Deed, Deed of Trust - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	Y	1	\$0	Y	Y	
53	Letters of Administration/Letters Testamentary, Deed, Deed of Trust, Assignment of Rents - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid.	1	4	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Fee only applies to the first three (3) titles, 4th title would be exempt \$225 cap reached.
54	Mechanic's Lien - Single document, single parcel	1	1	N	1	\$75	N	N	
55	Mechanic's Lien - Single document, multiple parcels	1	1	N	5	\$225	N	N	Usually each parcel is noted as a separate address. Assumes there is only one SB 2 transaction because parcels are owned by the same owner. \$75 fee per parcel. \$225 cap applies. \$225 cap reached.
56	Modification of Deed of Trust, Quitclaim Deed - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	2	Y	1	\$0	Y	Y	

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57	Modification of Deed of Trust, Quitclaim Deed - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	2	N	1	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
58	Notice of Assessment Lien - Agency, Payment of Contractual Assessment Required	1	2	N	1	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
59	Notice of Completion - single parcel	1	1	N	1	\$75	N	N	
60	Notice of Completion - single document, multiple parcels	1	1	N	5	\$225	N	N	Considered one (1) SB 2 transaction with multiple parcels. \$75 fee per parcel. \$225 cap applies. \$225 cap reached.
61	Notice of Completion, Grant Deed, Notice of Non-adversarial Procedures, Option to Repurchase - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	4	Y	1	\$0	Y	Y	
62	Notice of Completion, Grant Deed, Notice of Non-adversarial Procedures, Option to Repurchase - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	4	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Fee only applies to the first three (3) titles, 4th title would be exempt \$225 cap reached.

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63	Notice of Intent to Preserve Interest in Real Property	1	1	N	1	\$75	N	N	
64	Notice of Trustee Sale	1	1	N	1	\$75	N	N	
65	Order of Final Distribution - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	1	Y	1	\$0	Y	Y	
66	Parcel Map	1	1	N	2	\$150	N	N	\$75 fee applies per parcel to the maximum of \$225 cap for each map
67	Preliminary Notice	1	1	N	1	\$0	Y	N	Filed document; not recorded and therefore not subject to SB 2 fee
68	Reconveyance (Delayed) - recorded after transfer documents with no exemption reason listed	1	1	N	1	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
69	Record of Survey	1	1	N	1	\$75	N	N	
70	Record of Survey - multiple parcels	1	1	N	5	\$225	N	N	\$75 fee applies per parcel to the maximum of \$225 cap for each map

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71	Release document (Satisfaction of Lien, Acknowledgment of Satisfaction of Judgment, Release, Partial Release, Reconveyance, etc.) submitted together with a Deed, Deed of Trust - all documents related and in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	Y	1	\$0	Y	Y	Since all documents are in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid they are all exempt.
72	Release document (Satisfaction of Lien, Acknowledgment of Satisfaction of Judgment, Release, Partial Release, Reconveyance, etc.) submitted together with a Deed, Deed of Trust- not in connection with a transfer of an owner-occupier residential dwelling. or no DTT was paid	1	3	N	1	\$225	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. \$225 cap would apply if more than 3 titles.

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73	Release document (Satisfaction of Lien, Acknowledgment of Satisfaction of Judgment, Release, Partial Release, Reconveyance, etc.) <u>not related to other documents</u> and submitted together with a Deed, Deed of Trust - that are in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	3	Y	1	\$75	Y/N	Y	If release document is not related to or in connection with the exempt documents, the fee would apply to the non exempt release documents only. A reason for exemption would need to be listed on the documents claiming exemption. Considered one (1) SB 2 transaction. \$75 fee per title on non-exempt document(s). \$225 cap would apply if more than 3 titles.
74	Release of Assessment Lien - one (1) document with multiple PRR	1	1	N	50	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. (Blanket Rule applies, one title with additional indexing for the number of PRR's)
75	Release of Mechanic's Lien - one (1) document with five (5) PRR	1	1	N	N/A	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. (Blanket Rule applies, one title with additional indexing for the number of PRR's)
76	Re-recording of document - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	1	Y	1	\$0	Y	Y	Exempt if the original document would be exempt from the \$75 fee, reason for exemption is still required

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78	Revocable Transfer on Death Deed	1	1	N	1	\$75	N	N	Transfer does not occur until date of Death. \$75 fee applies per parcel. \$225 cap would apply per transaction.
79	Subdivision Map	1	1	N	4	\$225	N	N	\$75 fee applies per parcel to the maximum of \$225 cap for each map
80	Subordination and Non-Disturbance Agreement	1	2	N	1	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Would only be exempt if DTT paid or in connection with a transfer to owner-occupier of a residential property. These are normally for a commercial business property.
81	Substitution of Trustee and Full Reconveyance, Deed, Deed of Trust - where Sub/Recon is not related to or in connection with Deed, Deed of Trust. And Deed, Deed of Trust are in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	2	4	Y	1	\$150	N/Y	Y	Considered two (2) SB 2 transactions. \$75 fee per title applies to two (2) titles, Substitution of Trustee and Full Reconveyance that are unrelated to and not in connection with exempt documents. Deed and Deed of Trust would be exempt. Exemption reason needed for documents claiming exemption.

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82	Substitution of Trustee and Full Reconveyance, Deed, Deed of Trust - where all documents are related to and in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	4	Y	1	\$0	Y	Y	Exemption reason needed for documents claiming exemption.
83	Substitution of Trustee and Reconveyance - in connection with a transfer of an owner-occupier residential dwelling, or in connection with a document where DTT was paid	1	2	N	1	\$0	Y	Y	
84	Substitution of Trustee and Reconveyance - not in connection with a transfer of an owner-occupier residential dwelling, or no DTT was paid	1	2	N	1	\$150	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
85	Termination of Independent Solar Energy Producer Contract	1	1	N	1	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title. Would only be exempt if recorded in connection with a document where DTT was paid or in connection with a transfer to owner-occupier of a residential property.

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86	UCC Financing Statement - one (1) document, one parcel (This will apply to all of the UCC forms including Assignment, Termination, Collateral Change, etc.)	1	1	N	1	\$75	N	N	Considered one (1) SB 2 transaction. \$75 fee per title.
87	UCC Financing Statement - five (5) documents, one parcel each document (This will apply to all of the UCC forms including Assignment, Termination, Collateral Change, etc.)	5	1	N	5	\$375	N	N	Considered five (5) SB 2 transactions. \$75 fee applies for each transaction. (apply to each document separately, \$225 cap does not apply)
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91	<p>SB 2 transaction: a group of documents that relate to, for example, a sale or a transfer transaction of real property. A batch of documents received from one party, for recording, may include multiple SB 2 transactions.</p> <p>Multi -"ways": a single document that contains two or more instruments, papers, or notices serially incorporated into that one document such as a Substitution of Trustee and Full Reconveyance = two (2) separate titles and SB2 fees. See GOV 27361.1</p> <p>Clarification of Blanket Rule: a single document that contains multiple PRRs will be counted as one title with additional indexing. See GOV 27361.2</p> <p>Parcels: Documents may not list number of parcels. Treat as one parcel if not listed.</p>								
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