



OFFICE OF  
**ASSESSOR-COUNTY CLERK-  
RECORDER & ELECTIONS**  
COUNTY OF SAN MATEO

**MARK CHURCH**  
ASSESSOR-COUNTY CLERK-  
RECORDER & CHIEF ELECTIONS OFFICER

March 13, 2018

Subject: **2018 571-L**

**IMPORTANT Instructions for the Electronic submission of the Business Property Statement**

Dear Leasing/Vending Companies and Financial Institutions,

As we notified you through the e-mail dated January 18, 2018, our office is no longer capable of handling the paper filings and therefore, this year we are asking Leasing/Vending Companies and Financial Institutions to file your Business Property Statement (571-L Form) electronically. This filing method is simple, reliable and efficient for both taxpayers and the Assessor.

**Please find below the detailed instructions to file your 571-L Form electronically:**

1. **Download and Save the below Files from the SMC ACRE website Leased Equipment Forms page ([www.smcacre.org/post/leased-equipment-forms](http://www.smcacre.org/post/leased-equipment-forms)):**
  - a. 2018 FORM 571-L\_Page 1.pdf
  - b. 2018 SMC Leasing Excel Template.xlsx
  - c. 2018 Leased Equipment Declaration Instructions for Agents (contains the 2018 Agency Authorization Form)
  - d. San Mateo County\_CitiesList.pdf
  
2. **Complete the FORM 571-L:**
  - a. Complete the first page of your 571-L Form, using the fillable PDF form, print it and sign it
  - b. Scan your **signed first page** of the 571-L Form to create a PDF file. Please include your 571-L Account Number and Company Name as part of your file name (e.g.: **0123450001 ABC Leasing Co 2018 571L.pdf**)
  
3. **Complete the Excel Spreadsheets for your Conditional Sales Contracts and True Leases:**
  - a. Put your Company Name, 571-L Account Number and Contact information including your e-mail address at the top of your Excel spreadsheet(s). This will help us tremendously to link your 571-L Form to your spreadsheet(s)
  - b. Complete **separate** spreadsheets for your Conditional Sales Contracts and True Leases (please see the two different tabs/sheets in the attached Excel template - 2018 SMC Leasing Excel Template.xlsx)
  - c. Please make sure that on your 571-L Form, Line 3 under **Part II- "Equipment out on lease, rent or conditional sales to others"**, the total Cost reported equals the total of the True Lease and Conditional Sales numbers on your Excel spreadsheets
  - d. Include the current billing address for lessees on your Leasing Schedule in the spreadsheet, in addition to the equipment location (we've experienced large amounts of returned mails for tax bills due to the incorrect Lessee address)
  - e. Please make sure the equipment is located in San Mateo County and also specify the correct city name, not just the Zip Code (See the List of Cities in the file: 2018 SMCA40\_CitiesList.pdf)
  - f. Please include your 571-L Account Number and Company Name as part of your Spreadsheet file name (e.g.: **0123450001 ABC Leasing Co SMC Leasing 2018.xlsx**)

555 County Center, Redwood City, CA 94063

**P** 650.363.4501 **F** 650.599.7456 **email** leasingcorrespondence@smcacre.org **web** www.smcacre.org

4. **Options to send your files to San Mateo County:**

- a. Option 1 (Preferred Option):
  - Email the completed, signed and scanned first page of your 571-L PDF form and your Spreadsheet(s) to: [Leasing@smcacre.org](mailto:Leasing@smcacre.org)
  - Put your 571-L Account Number and Company Name on the SUBJECT LINE of your email
- b. Option 2:
  - Securely Transfer (SFTP) the completed, signed and scanned first page of your 571-L PDF form and your Spreadsheet(s) using this link:  
<https://sftp.smcare.org/?ShareToken=F363081CCCD8232F841F54EFAA493586935ABC9>

5. **Filing Deadlines:**

- a. If your 571-L Form includes Conditional Sales Contracts, please file your form and the spreadsheets by March 31, 2018. This allows us to bill the lessees in a timely fashion and process your returns promptly.
- b. If your 571-L Form contains only True Leases, please file your form and the spreadsheet by April 30, 2018.

If you have questions regarding the filing of your 2018 Business Property Statement, or other assessment matters, please contact Marsha Winters at (650) 599-1628 or by email at [mwinters@smcacre.org](mailto:mwinters@smcacre.org).

***However, send your filings only to [Leasing@smcacre.org](mailto:Leasing@smcacre.org).***

Respectfully yours,

Marsha Winters  
Principal Auditor-Appraiser  
County of San Mateo Assessor Division  
Phone: 650.599.1628

[Leasingcorrespondence@smcacre.org](mailto:Leasingcorrespondence@smcacre.org)