

Complete and email to orders@ultimaabstract.com

IMPORTANT: All fields are required to prepare transfer tax forms. Include a copy of the deed, lease or other transfer document with this form. Submit a separate request for each document that requires transfer tax forms; a fee applies to each set prepared. A copy of the **contract of sale** is required for all transactions of **\$400,000.00 and above**.

REQUEST INFORMATION

TITLE NUMBER

REQUEST DATE

CLOSING DATE

REQUESTED BY

EMAIL

PHONE

JURISDICTION

☐ New York City – ACRIS (RPT / TP-584 / NYC-RPT)☐ Westchester County (TP-584 / RP-5217 via County Clerk)

Westchester note: the Cities of Yonkers, Mount Vernon and Peekskill impose a local transfer tax in addition to the NYS transfer tax. Please list the municipality in the Property section below.

SELLER SIDE

Seller attorney

ATTORNEY NAME

FIRM

ADDRESS

PHONE

EMAIL

Seller 1

FULL LEGAL NAME / ENTITY NAME

ADDRESS

SSN / EIN (OR AFFIDAVIT) *

IF SINGLE-MEMBER LLC: MEMBER NAME

MEMBER SSN / EIN *

Seller 2

FULL LEGAL NAME / ENTITY NAME

ADDRESS

SSN / EIN (OR AFFIDAVIT) *

IF SINGLE-MEMBER LLC: MEMBER NAME

MEMBER SSN / EIN *

PURCHASER SIDE**Purchaser attorney**

ATTORNEY NAME

FIRM

ADDRESS

PHONE

EMAIL

Purchaser 1

FULL LEGAL NAME / ENTITY NAME

ADDRESS

SSN / EIN (OR AFFIDAVIT) *

IF SINGLE-MEMBER LLC: MEMBER NAME

MEMBER SSN / EIN *

Purchaser 2

FULL LEGAL NAME / ENTITY NAME

ADDRESS

SSN / EIN (OR AFFIDAVIT) *

IF SINGLE-MEMBER LLC: MEMBER NAME

MEMBER SSN / EIN *

* Send SSN/EIN information securely (encrypted email or ClosingLock). If an SSN/EIN is not provided, an affidavit is required. If a seller or purchaser is a partnership or multi-member LLC, complete the Disclosure Addendum.

PROPERTY & TRANSACTION

PROPERTY ADDRESS

MUNICIPALITY (CITY / TOWN / VILLAGE)

COUNTY

BOROUGH (NYC)

SECTION

BLOCK

LOT(S)

PROPERTY TYPE

☐ 1-3 family ☐ Condo ☐ Co-op ☐ Commercial ☐ Vacant land ☐ Other:

Accommodation recording: provide a copy of the current tax bill so we can complete the RP-5217.

CONSIDERATION (\$)

DATE OF CONVEYANCE

CONTRACT DATE

TYPE OF CONVEYANCE (SEE TP-584, PAGE 1)

Is the purchaser paying the transfer tax?

☐ Yes ☐ No

Mansion tax applies (residential, \$1,000,000+)?

☐ Yes ☐ No

Is an exemption being claimed?

☐ Yes ☐ No *If yes, detail below*

EXEMPTION DETAILS

COMMENTS / SPECIAL INSTRUCTIONS

Did you know? Transfer tax documents created in ACRIS are only valid for **90 days** before they are purged. After 90 days, new forms must be created and a new prep fee paid, if applicable.

LLCS & PARTNERSHIPS

If the **seller or purchaser is a partnership or limited liability company** (foreign or domestic), complete the attached Disclosure Addendum and submit it with your executed transfer tax forms.

New York City – partnerships & multi-member LLCs. Effective May 18, 2015, the NYC-RPT requires the name and SSN/EIN of each general partner or LLC member. Signatures are not required. Submit this as a supporting document, with a separate page for each partnership or LLC. If an SSN or EIN is not provided, an affidavit explaining why must be submitted.

New York State – LLCs. Effective September 13, 2019, Chapter 297 of the Laws of 2019 amended NYS Tax Law §1409(a) and added subdivision (h) to §11-2105 of the NYC Administrative Code. When residential 1–4 family real property is conveyed by or to an LLC, a document disclosing the ultimate ownership by natural persons must accompany the TP-584 and NYC RPT. Per TSB-M-19(2)R, a **natural person** is a human being, as opposed to an artificial person, who is the beneficial owner of the real property.

New York LLC / Partnership Disclosure Addendum

NYS Tax Law §1409(a) · NYC Administrative Code §11-2105(h)

TITLE NUMBER

PROPERTY ADDRESS

The ☐ Grantor ☐ Grantee is

The names, business addresses and taxpayer identification numbers / Social Security numbers of all members, managers and any other authorized persons of such limited liability company / partnership are as follows:

NAME	BUSINESS ADDRESS	EIN / SSN

For each LLC, partnership, trust or business entity listed above, the names, business addresses and TIN/SSN of all shareholders, directors, officers, members, managers and partners (down to a natural person) are as follows:

NAME	BUSINESS ADDRESS	EIN / SSN

* Send SSN/EIN information securely (encrypted email or ClosingLock). Attach additional pages if needed.