



CALIFORNIA  
ASSOCIATION  
OF REALTORS®

## ADDENDUM No. 1

(C.A.R. Form ADM, Revised 12/21)

The following terms and conditions are hereby incorporated in and made a part of the Purchase Agreement, OR ☐ Residential Lease or Month-to-Month Rental Agreement, ☐ Transfer Disclosure Statement (Note: An amendment to the TDS may give the Buyer a right to rescind), ☐ Other \_\_\_\_\_, dated \_\_\_\_\_, on property known as 28740 Avalon Avenue

Moreno Valley, CA 91764 ("Property/Premises"),

in which \_\_\_\_\_ is referred to as ("Buyer/Tenant")

and Joselyn Gutierrez, VP Citizens Business Bank, Joel S. Napalan, SVP Citizens Business Bank is referred to as ("Seller/Landlord").

Buyer/Tenant and Seller/Landlord are referred to as the "Parties."

**1. This is a Trust Sale (Special Needs Trust sale) and the property is being sold "as is" with no representation or warranties implied or expressed made by Seller or Seller's agents and /or representatives.**

**2. Buyer's exact vesting shall be as follows (including marital status along with type of ownership)**

**3. Structural pest control and repair work is not a condition of this sale. If Buyer elects to make repairs, the same shall be completed at Buyer's expense after close of escrow.**

**4. All retrofitting required prior to Close of Escrow by any local ordinance or state law shall be at the Buyer's expense.**

**5. If buyer elects to purchase a home protection plan or warranty it shall be at Buyer's expense with coverage and company to be selected by Buyer.**

**6. The Title company to be Old Republic Title Company - Lucy Krappman. Escrow Company to be Golden West Escrow - Carlos Hernandez.**

**7. CAR Trust Advisory to be included with the Purchase Agreement.**

**8. All appliances to be included without any warranty or guaranty.**

The foregoing terms and conditions are hereby agreed to, and the undersigned acknowledge receipt of a copy of this Addendum.

Buyer/Tenant \_\_\_\_\_ Date \_\_\_\_\_

Buyer/Tenant \_\_\_\_\_ Date \_\_\_\_\_

Seller/Landlord Joselyn Gutierrez Date 06/03/2024

Seller/Landlord Joselyn Gutierrez, VP Citizens Business Bank  
Joel S. Napalan Date 06/03/2024

**Joel S. Napalan, SVP Citizens Business Bank**

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ADM REVISED 12/21 (PAGE 1 OF 1)

### ADDENDUM (ADM PAGE 1 OF 1)

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28740 Avalon



# TRUST ADVISORY

For Properties Being Sold by the Trustee of a Trust  
(C.A.R. Form TA, Revised 12/21)

Property Address: 28740 Avalon Avenue, Moreno Valley, CA 91764 ("Property").

Property is being held in a revocable or irrevocable trust for the benefit of those persons or entities named as beneficiaries in the trust. For the purpose of the sale of Property, the trustee of the trust is treated as the Seller. Even if Seller is exempt from some obligations, Seller must still comply with many others. This Advisory is intended to inform Buyer and Seller of their rights and obligations independent of those established by the contract between them. **If Property is placed in a trust, any trustee must complete a TDS and other disclosures that would be required of other owners if: (i) any such trustee is a natural person AND (ii) the trust is a revocable trust, AND (iii) the trustee either is the former owner of Property or was an occupant in possession of Property within the preceding year. The disclosures are required of any trustee who meets the above requirements even if other trustees do not.**

## 1. SELLER MUST COMPLY WITH THE FOLLOWING:

- A. Known Material Fact Disclosures:** Seller is obligated to disclose known material facts affecting the value and desirability of the Property even if the specific Real Estate Transfer Disclosure Statement Form is not required to be completed.
- B. Hazard Zones:** Seller is not exempt from applicable statutory obligations to disclose earthquake fault zones, seismic hazard zones, state fire responsibility areas, very high fire hazard severity zones, special flood hazard areas and flood hazard zones pursuant to the Public Resources Code, Government Code and United States.
- C. Smoke Detectors:** The sale is not exempt from the State requirements that, for single family residences, operable smoke detectors be in place. It is negotiable between Buyer and Seller who is to pay for the cost of compliance.
- D. Water Heaters:** The sale is not exempt from the State requirement that water heaters be properly anchored, braced or strapped and that Seller provide a written statement of compliance to Buyer.
- E. Lead-based Paint:** The Seller is not exempt from the federal obligation to: (i) disclose known lead-based paint and lead-based paint hazards; (ii) provide Buyer copies of reports or studies covering lead-based paint and hazards on the Property; (iii) provide Buyer with the pamphlet "Protect Your Family From Lead In Your Home;" and (iv) give Buyer a 10-day opportunity to inspect for lead-based paint and hazards, if the Property contains residential dwelling units and was constructed prior to 1978.
- F. Carbon Monoxide Devices:** The sale is not exempt from the State requirement that on or before July 1, 2011, for all existing single family dwelling units, and on or before January 1, 2013, for all other existing dwelling units, the owner must install a carbon monoxide device approved and listed by the State Fire Marshall in the dwelling unit if the dwelling unit has a fossil fuel burning heater or appliance, fireplace, or an attached garage.
- G. Water Conserving Plumbing Fixtures:** The Sale is not exempt from the State requirement that (i) single family residences built before January 1, 1994 be equipped with water conserving plumbing fixtures by January 1, 2017 and multi-family and commercial properties be equipped with water conserving plumbing fixtures by January 1, 2019; (ii) Sellers disclose to Buyers the requirements of the law; and (iii) sellers disclose to Buyers whether the Property contains any non-compliant plumbing fixtures. See C.A.R. Form WCMD for further information.
- H. Tax Withholding:** The sale is not exempt from providing information pertaining to the withholding obligation under either the federal "FIRPTA" or the California withholding requirements upon the sale of real property. **Federal:** For federal purposes, a non-resident alien includes a fiduciary. A trustee is treated as a non-resident even if all beneficiaries are citizens or residents of the United States. **State:** The trust may be exempt from withholding (but not the completion of the real estate withholding certificate) if: (i) the trust was revocable prior to the decedent's death; (ii) the Property was last used as the decedent's principal residence; and (iii) the trustee is electing to treat the trust as part of the decedent's estate under IRC § 645 (see Instructions for FTB Form 593-C).
- I. Megan's Law Database Disclosure:** The sale is not exempt from the requirement that residential sales contracts contain the following notice regarding the availability of information about registered sex offenders: "Notice: Pursuant to Section 290.46 of the Penal Code, information about specified registered sex offenders is made available to the public via an Internet Web site maintained by the Department of Justice at [www.meganslaw.ca.gov](http://www.meganslaw.ca.gov). Depending on an offender's criminal history, this information will include either the address at which the offender resides or the community of residence and ZIP Code in which he or she resides." (Neither Seller nor Brokers are required to check this website. If Buyer wants further information, Broker recommends that Buyer obtain information from this website during Buyer's inspection contingency period. Brokers do not have expertise in this area.)

(With Listing) Broker's Initials SEA

(With RPA) Buyer's Initials /

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Seller's Initials JG JSN



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## TRUST ADVISORY (TA PAGE 1 OF 2)

**2. SELLER MAY BE EXEMPT FROM THE FOLLOWING:**

- A. (i) Disclosure Statements:** Seller, unless specified in 2A(ii), does not have to complete, sign and provide Buyer with a Real Estate Transfer Disclosure Statement or Natural Hazard Disclosure Statement (C.A.R. Forms TDS and NHD). **Seller remains obligated to make the disclosures and comply with the items specified in Paragraph 1.**
- (ii)** If Property has been placed in a trust, the trustee(s) of the trust is considered the Seller for the purpose of complying with disclosure laws. Seller must complete, sign and provide Buyer with a TDS if (1) the Seller is a natural person, AND (2) the trust is a revocable trust, AND (3) the trustee is either a former owner of the Property or was an occupant in possession of the Property within the preceding year.
- B. Other Exemptions:** Unless paragraph 2A(ii) applies, Seller is exempt from providing Buyer with a Mello- Roos district lien disclosure, an Improvement Bond Act of 1915 notice, a Supplemental Property Tax notice, a Notice of Private Transfer Fee pursuant to California Civil Code §§ 1102 et seq. completing and providing either a Homeowner's or Commercial Property Owners Guide to Earthquake Safety, including any corresponding form.
- C. Exempt Seller Disclosures:** Even exempt Sellers have statutory or contractual obligations to make certain disclosures and may, or are required by contract to, use an Exempt Seller Disclosure (C.A.R. Form ESD) and is strongly encouraged to do so.

**3. OTHER CONSIDERATIONS:**

- A. Local Law:** Local law may impose obligations on the transfer of real property (such as the installation of low flow toilets or shower heads, emergency gas shut-off valves or installation of smoke detectors). Local law should be consulted to determine if sales by a trustee of a trust are exempt from such requirements.
- B. Death:** If the Property is being sold because of the death of an occupant of the Property, and if Buyer has concerns about the manner, location or details of the death, then Buyer should direct any specific questions to Seller.

**4. BROKERS:**

- A. Inspection:** The sale is not exempt from the Broker's obligation to conduct a reasonably competent and diligent visual inspection of the accessible areas of the Property and disclose to Buyer material facts revealed by such an inspection in the sale of residential property containing one-to-four dwelling units. Brokers may do so on C.A.R. Form AVID.
- B. Agency:** The sale is not exempt from the obligation to provide agency relationship disclosure and confirmation forms in the sale of residential property containing one-to-four dwelling units, commercial Property and vacant land.

**By signing below, the undersigned acknowledge that each has read, understands and has received a copy of this Trust Advisory.**

Seller  Joselyn Gutierrez Joselyn Gutierrez, VP Citizens Business Bank Date 06/03/2024

Seller  Joel S Napalan Joel S. Napalan, SVP Citizens Business Bank Date 06/03/2024

**AT TIME OF LISTING**

Real Estate Broker Re/Max Tri-City Realty


By  Sonia E. Amin  Emilie Broughton 06/03/24 Sonia E. Amin Date 06/02/2024

**AT TIME OF SALE**

Buyer \_\_\_\_\_ Date \_\_\_\_\_

Buyer \_\_\_\_\_ Date \_\_\_\_\_

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525 South Virgil Avenue, Los Angeles, California 90020



Tax Search



Riverside, California  
Searched: 304-111-012  
Non-Order Search

Tax Year: 2023-2024  
Tax Cover: 04/12/2024  
Searched By: WENDY MCCLAUGHLIN  
Searched On: 4/16/2024 8:03 PM

Company: OLD REPUBLIC TITLE COMPANY | STOCKTON WTG PROCESSING | 01 | CRN: 00070-00084

|                    |   |
|--------------------|---|
| APN:               | 304-111-012                                   |
| Described As:      | .20 ACRES M/L IN LOT 47 MB 334/016 TR 30233-1 |
| Address:           | 28740 AVALON                                  |
| City:              | MORENO VALLEY                                 |
| Billing Address:   | 701 N HAVEN AV STE 350 ONTARIO CA 91464       |
| Assessed Owner(s): | CITIZENS BUSINESS BANK                        |
| Search As:         | Lot 47 Map 334/16 (Tr 30233-1)                |

|                        |               |                               |                         |              |
|------------------------|---------------|-------------------------------|-------------------------|--------------|
| Tax Rate Area:         | 021-410       | Value                         | Conveyance Date:        | MAR 2010     |
| Use Code:              | 419           | Land: 80,374.00               | Conveying Instrument:   | 2010-0111312 |
| SINGLE FAMILY DWELLING |               | Improvements: 448,818.00      | Date Transfer Acquired: |              |
| Region Code:           |               | Personal Property:            | Vesting:                |              |
| Flood Zone:            |               | Fixtures:                     | Year Built:             |              |
| Zoning Code:           |               | Inventory:                    | Year Last Modified:     |              |
| Taxability Code:       |               | Exemptions                    |                         |              |
| Tax Rate:              | 1.219886      | Homeowner:                    | Square Footage          |              |
| Auditor Tax Rate:      | 1.122368      | Inventory:                    | Land: 8712              |              |
|                        |               | Personal Property:            | Improvements:           |              |
|                        |               | Religious:                    |                         |              |
|                        |               | All Other:                    | Tax Defaulted:          |              |
| Bill #:                | 2023000541761 | Net Taxable Value: 529,192.00 | Total Tax:              | 6,455.54     |
| Issue Date:            |               |                               |                         |              |

| Installment    | Amount   | Penalty | Due Date   | Status | Payment Date | Balance |
|----------------|----------|---------|------------|--------|--------------|---------|
| 1st            | 3,227.77 | 322.78  | 12/10/2023 | PAID   | 12/11/2023   | 0.00    |
| 2nd            | 3,227.77 | 360.84  | 04/10/2024 | PAID   | 12/11/2023   | 0.00    |
| Total Balance: |          |         |            |        |              | 0.00    |

| Account | Special Lien Description                               | Amount   |
|---------|--|----------|
| 01-0000 | GENERAL PURPOSE  | 5,291.91 |
| 03-4201 | MORENO VALLEY UNIFIED B & I                            | 519.51   |
| 03-9101 | RIVERSIDE COMMUNITY COLLEGE B & I                      | 77.79    |
| 04-5301 | METROPOLITAN WATER EAST                                | 18.52    |
| 04-5476 | EASTERN MUNI WATER U-22                                | 31.75    |
| 68-1377 | FLOOD CONTROL STORMWATER / CLEANWATER/SANTA ANA        | 3.76     |
| 68-1860 | CSA #152 CITY OF MORENO VALLEY                         | 8.14     |
| 68-2491 | MORENO VALLEY CFD 1 NEIGHBORHOOD PARK MAINT MELLO-ROOS | 180.12   |
| 68-4271 | MORENO VALLEY CS ZONE A                                | 87.50    |
| 68-4272 | MORENO VALLEY CS ZONE B                                | 34.06    |
| 68-4274 | MORENO VALLEY CS ZONE C                                | 9.00     |
| 68-4285 | MV LMD 2014-02 LANDSCAPE                               | 110.00   |
| 68-4290 | MORENO VALLEY FEDERALLY MANDATED NPDES                 | 51.54    |

|         |   |       |
|---------|---|-------|
| 68-5305 | METRO WATER DISTRICT STANDBY EAST                     | 6.94  |
| 68-5402 | EASTERN MUNIPAL WATER DISTRICT STDBY-<br>COMBINED CHG | 25.00 |

THE INFORMATION PROVIDED IS A SUMMARIZED SEARCH OF OUR RECORDS. PROPERTY INSIGHT DOES NOT WARRANT NOR GUARANTEE THE ACCURACY NOR COMPLETENESS OF THE INFORMATION SHOWN. A FULL/EXTENDED TAX SEARCH IS RECOMMENDED.

\*\*\* END OF REPORT \*\*\*



Report Date: 5/20/2024  
Report Number: 10141-471  
Subject Property: 28740 AVALON AVE  
APN: 304-111-012  
Page Number: 10

**MELLO-ROOS COMMUNITY FACILITIES DISTRICT(S)**

SUBJECT PROPERTY ☒ IS ☐ IS NOT SUBJECT TO MELLO-ROOS COMMUNITY FACILITIES DISTRICT SPECIAL TAX LIEN(S).

Mello-Roos Community Facilities Districts ("CFD") provide a method of financing certain public capital facilities and services especially in developing areas and areas undergoing rehabilitation. Public improvements funded by Mello-Roos CFDs may include, but are not limited to, roads, schools, water, sewer and storm drain facilities. Public services funded by Mello-Roos CFDs may include, but are not limited to, police and fire protection services, recreation program services, and flood or storm protection services. Mello-Roos CFDs commonly fund the construction of public improvements through the issuance of bonds. A special tax lien is placed on property within the district for the annual payment of principal and interest as well as administrative expenses. Typically, the annual special tax continues until the bonds are repaid, or until special taxes are no longer needed. In most instances, but not all, the special tax is collected with regular property taxes.

This property is within the Mello-Roos CFD(s) listed below and is subject to a special tax that will appear on the property tax bill. This special tax is in addition to the regular property taxes and any other charges and benefit assessments that will be listed on the property tax bill. This special tax may not be imposed on all parcels within the city or county where the property is located. This special tax is used to provide public facilities or services that are likely to particularly benefit the property.

The maximum tax rate, the maximum tax rate escalator, and the authorized facilities which are being paid for by the special taxes and by the money received from the sale of bonds which are being repaid by the special taxes, and any authorized services are indicated below. These facilities may not yet have all been constructed or acquired and it is possible that some may never be constructed or acquired.

**1. Community Facilities District No. 1 - City of Moreno Valley - (951) 413-3000**

**Current Levy:** \$180.12

**Maximum Tax Rate:** \$194.49

**Ending Year:** In Perpetuity

**Maximum Tax Rate Escalator:** The Maximum Tax Rate Amount will increase by The Maximum Tax Rate will increase by the greater of the U.S. Department of Labor Consumer Price Index for the Los Angeles-Riverside-Orange County area, All Urban Consumers category as of the annual percentage change of the prior year, or 2.00%, commencing July 1, 2004. per year.

**Authorized Facilities:** None

**Authorized Services:** The special taxes will be used to pay for the maintenance and/or repair of Parks and Park Improvements, including, but not limited to, the planting, replanting, mowing, trimming, irrigation and fertilization of grass, trees, shrubs, and other ornamental plants and vegetation, the operation, maintenance, repair, and replacement of irrigation systems associated with Parks and Park Improvements, and all the effort by Park Rangers that is devoted to the maintenance of the Parks, Park Improvements, and public safety.



1915 BOND ACT ASSESSMENT DISTRICT(S)

SUBJECT PROPERTY ☐ IS ☒ IS NOT SUBJECT TO IMPROVEMENT BOND ACT OF 1915 SPECIAL ASSESSMENTS LIEN(S).

1915 Bond Act Assessment Districts (“AD”) provide a method of financing certain public capital facilities. Public improvements funded by 1915 Bond Act Assessment Districts may include, but are not limited to, roads, sewer, water and storm drain systems, and street lighting. 1915 Bond Act Assessment Districts commonly fund the construction of public improvements through the issuance of bonds. A special assessment lien is placed on property within the Assessment District. The lien amount is calculated according to the specific benefit that an individual property receives from the improvements and is amortized over a period of years. 1915 Bond Act Assessments Districts can be prepaid at any time. In most instances, but not all, the assessment is collected with regular property taxes.

This property is within the 1915 Bond Act Assessment District(s) named below and is subject to annual assessment installments levied by the assessment district that will appear on the property tax bill. The annual assessments are in addition to the regular property taxes and any other charges and benefit assessments that will be listed on the property tax bill. The assessment district(s) has issued bonds to finance the acquisition or construction of certain public improvements that are of direct and special benefit to property within the assessment district. The bonds will be repaid from annual assessment installments on property within the assessment district. The special assessment is used to provide public facilities that are likely to particularly benefit the property.

The annual assessment installment and public facilities that are being paid for by the money received from the sale of bonds that are being repaid by the assessments are indicated below. These facilities may not yet have all been constructed or acquired and it is possible that some may never be constructed or acquired.