



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

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

**Instructions for the Electronic submission of the 2023 Business Property Statement (Form 571-L) for Equipment Leasing/Vending Companies and Financial Institutions.**

The Assessor is required to annually assess taxable business personal property as of the lien date (January 1<sup>st</sup>). Business Personal Property includes all “Equipment out on lease, rent, or conditional sale to others” used in the operation of a business. Business Personal Property is reported to the Assessor annually on a form known as the Business Property Statement (Form 571-L). By filing electronically, you will be assisting our office to process the business property statements efficiently. If filing electronically, **please do not mail us a paper copy of your rendition as this will create duplication.**

\* **Note:** If you received this email, we are not sending you a paper statement. You are encouraged to file the 2023 Form 571-L electronically.

Below are the detailed instructions to file your Form 571-L electronically:

**1. Required or needed Forms (files):**

- a. 2023 FORM 571-L (required)
- b. 2023 SMC Leasing Excel Template (requested)
- c. 2023 Leased Equipment Instructions for Agents (if applicable)
- d. 2023 Agency Authorization Form (if applicable)
- e. San Mateo County Cities List (for your reference)

These forms are available on our website:

<https://www.smcacre.org/post/business-personal-property-forms> (under “**Business Property Statement Forms**” for item a; “**Leased Equipment Forms**” for items b, c, and e; or “**Other Forms**” for item d.)

**2. Complete the 2023 FORM 571-L:**

- a) Complete 2023 Form 571-L, **page 1 Only** (if submitting equipment on spreadsheet) and **sign**.
- b) **Save the PDF** under a file name using the 10-digit Account Number and Company Name (e.g. [0123450001\\_ABC\\_Leasing\\_Co\\_2023\\_571L.pdf](#)).

\* **Note:** Please make sure that on your **Form 571-L, Part II: Declaration of Property Belonging to You, Line 3, “Equipment out on lease, rent, or conditional sale to others”**, that the total **Cost reported equals** the total **combined costs of the True Leases and Conditional Sales leases** listed on your Excel spreadsheets.



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3. **Complete the Excel Spreadsheets** (the SMC Leasing Excel Template or format is recommended):
  - a. Make sure your Company Name, Assessor's Account Number, and your Contact information, including your e-mail address is at the top of your Excel spreadsheet(s).
  - b. In addition to the equipment location, include the current billing address for each lessee on the spreadsheet (to avoid returned mail of tax bills due to an incorrect Lessee address).
  - c. Make sure the equipment is in San Mateo County and specify the correct city name, not just the Zip Code (see the list of Cities in the file: SMC\_Cities\_List.pdf).
  - d. Include your Assessor's Account Number and Company Name as part of your Spreadsheet file name (e.g. **0123450001 ABC Leasing Co SMC Leasing 2023.xlsx**).
  
4. **Options for filing your Business Property Statement (Form 571-L) to San Mateo County:**
  - Option 1 (the Preferred Option):  
Email your completed and signed Form 571-L, page 1, along with your Spreadsheet(s) to:  
[Leasing@smcacre.org](mailto:Leasing@smcacre.org)
    - \* **Note:** In the Subject Line, please type your **Account Number and Company Name** (i.e. **0123450001 ABC Leasing Co 2023 571L**)
  
  - Option 2:  
Securely Transfer (SFTP) the completed, signed, and scanned first page of your Form 571-L PDF and your Spreadsheet(s) using this link (or Copy this link and Paste in your browser):  
<https://sftp.smcacre.org/?ShareToken=E7F895BC87F76E99F37018D4092BDCEEB39E59CF>
    - \* **Note:** Internet Explorer is not supported, please use Microsoft Edge, Google Chrome, Firefox, or some other browser.
  
  - Option 3:  
DocuSign and submit the 571L forms using e-signature. Excel worksheets need to be emailed. DocuSign does not allow EXCEL format.  
<https://www.smcacre.org/post/business-personal-property-forms> (under "Business Property Statement Forms".)
  
5. **Filing Deadlines:**
  - a. By law, the filing deadline is **April 1, 2023**, and becomes **delinquent after May 8, 2023**. If your Form 571-L includes Conditional Sales Contracts, please submit your filing as early as possible, as this allows us to bill the lessees in a timely fashion and process your returns promptly.

For **Filing your Form 571-L**, Email to: [leasing@smcacre.org](mailto:leasing@smcacre.org) (or see # 4 above for other filing options).

Please send all inquiries or other assessment matters to San Mateo County Assessor's Office - Leasing Department at: [leasingcorrespondence@smcacre.org](mailto:leasingcorrespondence@smcacre.org)