



County of San Diego, Planning & Development Services
CHANGE OF FINANCIAL RESPONSIBILITY
 SUPPORT SERVICES DIVISION

PART A: Completed by CURRENT Financially Responsible Party (FINRESP)

Authorization for Change of Financial Responsibility:

I, _____, the current Financially Responsible Party, hereby assign and transfer all rights and financial responsibilities for the following Trust Accounts (this information is available on your trust account billing statement) to the Party below in Part B:

Trust Account #(s): _____

Record ID(s): _____

I request the disposition of funds on deposit, or funds owed to the County, as follows (fill in all that apply below):

- Transfer the current Balance on Deposit of \$ _____ to the NEW FINRESP.
- Transfer the current Guarantee of \$ _____ to the NEW FINRESP.
- NEW FINRESP accepts responsibility for the current amount owed \$ _____ to the County on this project.
- CURRENT FINRESP is responsible for the outstanding amount of \$ _____ to the County on this project.
- Refund the current Balance on Deposit of \$ _____ to the CURRENT FINRESP.
- Refund the current Guarantee of \$ _____ to the CURRENT FINRESP (Substitutions may be required).
- None of the above applies. Reason: _____

CURRENT FINRESP: Print Name: _____
 Mailing Address: _____
 Phone: _____ Email: _____
 Signature: _____ Date: _____

PART B: Completed by NEW Financially Responsible Party (FINRESP)

Acceptance of Change of Financial Responsibility:

I, _____, the new Financially Responsible Party, hereby accept financial responsibility for the above-mentioned Trust Accounts from, _____ (CURRENT FINRESP see PART A above), effective date _____.

If the County should release all or a portion of the Trust Account funds to me, I hereby agree to defend and indemnify the County of San Diego from any and all claims that may arise from the release of said funds.

NEW FINRESP: Print Name: _____
 Mailing Address: _____
 Phone: _____ Email: _____
 Signature: _____ Date: _____

----- OFFICIAL USE ONLY -----	
Date Received:	_____
Date Processed:	_____
Processed By:	_____



**County of San Diego, PDS, SUPPORT SERVICES DIVISION
CHANGE OF FINANCIAL RESPONSIBILITY**

Continued

INSTRUCTIONS

DISCLAIMER: Be advised that this form only changes the Financial Responsibility on Trust Accounts. You must also submit a Plan Change and substitute any Guarantees/Securities.

If you have a project under review by the County of San Diego, have submitted Trust Account deposits as payment for work on the project and you are transferring financial responsibility of the project to another party, you must do the following:

CURRENT Financially Responsible Party must:

1. Complete and sign **PART A.** of this Change of Financial Responsibility form.
2. Give original form to the NEW FINRESP.
3. Keep a copy for your records.

NEW Financially Responsible Party must:

1. Complete and sign **PART B.** of this Change of Financial Responsibility form, indicating your acceptance of financial responsibility on the transferred project.
2. Provide a \$500 deposit or the amount specified by the Project Manager to deposit into the new Trust Account in your name.
 - This deposit will be used against any charges to this account
 - At the end of the project, if the funds on deposit are in excess of the total charges, the remaining funds will be refunded to the NEW FINRESP.
3. Complete and sign a Discretionary Permit Application (PDS-346), with NEW FINRESP contact information.

County Staff Distribution:

1. Deliver completed **Change of Financial Responsibility** (PDS-1004) to Trust Account Customer Service Unit.
2. Deliver completed **Discretionary Permit Application** (PDS-346) to the Project Manager.
3. Deliver the specified amount for deposit to the Cashier.

Planning & Development Services
Trust Account Customer Service Unit
5510 Overland Ave, Suite 310
San Diego, California 92123-1239

If you have any questions, contact the Trust Account Customer Service Unit at (858) 694-2320 or email PDSDep@sdcounty.ca.gov.