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Book 2024 Page 974 Type 03 013 Pages 2

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BRANDY MACUMBER, COUNTY RECORDER
MADISON COUNTY IOWA

CHEK

**AFFIDAVIT OF SURVIVING JOINT TENANT
FOR CHANGE OF TITLE TO REAL ESTATE
Recorder's Cover Sheet**

Preparer Information: Mark L. Smith, 101 1/2 W. Jefferson, Winterset, IA 50273, Phone:
515-462-3731

Taxpayer Information: Donald Shon Fagan, 107 N. West Street, Macksburg, IA 50155

Return Document To: Mark L. Smith, 101 1/2 W. Jefferson, Winterset, Iowa 50273

Grantors:

Nancy Gale Fagan

Grantees:

Donald Shon Fagan

Legal Description: See Page 2

Document or instrument number of previously recorded documents: _____



**AFFIDAVIT OF SURVIVING JOINT TENANT
FOR CHANGE OF TITLE TO REAL ESTATE**

STATE OF IOWA, COUNTY OF MADISON, ss:

I, Donald Shon Fagan, being first duly sworn on oath, depose and state as follows:

1. I am the surviving joint tenant of Nancy Gale Fagan, who died on March 23, 2024.
2. The following described real estate was owned only by Nancy Gale Fagan and this Affiant, as joint tenants with full rights of survivorship at the time of Nancy Gale Fagan's death:
Lots 78 and 79 of the Original Town of Macksburg, Madison County, Iowa.
3. Title was conveyed to the surviving joint tenant and decedent by instrument filed on July 20 2021, with reference number in Book 2021, Page 3013 of the Recorder's Office of Madison County, Iowa.
4. I hereby request that the auditor enter this information on the transfer books pursuant to Section 558.66 of the Iowa Code.
5. The Affiant is the son of the Decedent. (For deaths occurring after July 1, 1997, parents, grandparents, great-grandparents, and other lineal ascendants, children including legally adopted children and biological children entitled to inherit under the laws of Iowa, stepchildren, and grandchildren, great-grandchildren, and other lineal descendants are exempt from Iowa inheritance tax.)
6. Form 706, United States Estate Tax return, **IS NOT*** required to be filed as a result of the death of the Decedent.
7. An Iowa inheritance tax return is not required to be filed pursuant to section 450.22 subsection 3.

Donald Shon Fagan

Signed and sworn to (or affirmed) before me on

May 6, 2024

, by



Signature of Notary Public