



Document 2011 198

Book 2011 Page 198 Type 03 013 Pages 3

Date 1/18/2011 Time 3:55 PM

Rec Amt \$19.00 Aud Amt \$5.00

INDX ✓
ANNO
SCAN
CHEK

LISA SMITH, COUNTY RECORDER
MADISON COUNTY IOWA



AFFIDAVIT THAT NO INHERITANCE TAX IS DUE

THE IOWA STATE BAR ASSOCIATION
Official Form #356

Recorder's Cover Sheet

Preparer Information: (Name, address and phone number)

Jerrold B. Oliver, P.O. Box 230, Winterset, IA 50273, Phone: (515) 462-3731

Taxpayer Information: (Name and complete address)

Kenneth J. Bassett, 723 N 6th Ave. Cr., Winterset, IA 50273

✓ **Return Document To:** (Name and complete address)

Jerrold B. Oliver, P.O. Box 230, Winterset, IA 50273, Phone: (515) 462-3731

Grantors:

Kenneth J. Bassett

Grantees:

Legal description: See Page 2

Document or instrument number of previously recorded documents:



AFFIDAVIT THAT NO INHERITANCE TAX IS DUE

STATE OF IOWA

COUNTY OF MADISON

} ss:

I, Kenneth J. Bassett, being first duly sworn on oath, depose and state as follows:

1. I am the Spouse (insert relationship) of Donna L. Bassett (the "decedent") who died on the 10th day of November, 2010, and have an interest in the real estate described below by virtue of the fact that I am (surviving joint tenant with respect to the real estate described below) (~~a beneficiary of the~~ Trust created by agreement dated _____.)
2. There will be no estate proceedings instituted on account of the decedent's death.
3. Pursuant to Section 450.22, subsection 3 of the Iowa Code, no inheritance tax return is required to be filed in the Estate of Donna L. Bassett since (i) there is no federal estate tax filing obligation, and (ii) all of the decedent's assets either were held in joint tenancy with right of survivorship solely between the decedent and individuals listed in Section 450.9 of the Iowa Code as individuals that are entirely exempt from Iowa inheritance tax, or passed by beneficiary designation or pursuant to a trust intended to pass the decedent's property at death or through any other nonprobate transfer solely to individuals listed in Section 450.9 as individuals that are entirely exempt from Iowa inheritance tax.
4. The following described real estate was owned by (the undersigned and the decedent as joint tenants with rights of survivorship) (the _____ Trust created by agreement dated _____) at the time of Donna L. Bassett's death:
See Exhibit "A" attached

Locally known as
723 N 6th Ave. Cr., Winterset, IA 50273

5. This Affidavit is filed pursuant to Section 450.22, subsection 4 of the Iowa Code for the purpose of establishing of record nonliability for Iowa inheritance tax without the filing of an inheritance tax clearance.
6. This Affidavit is further filed to clear title to the real estate described herein.
7. I hereby request that the Auditor enter this information on the transfer books pursuant to Section 558.66 of the Iowa Code

Kenneth J. Bassett
Kenneth J. Bassett Affiant

Subscribed and Sworn to before me this 17 day of June, 2011.

Jerrold B. Oliver
Jerrold B. Oliver
Notary Public in and for the State of Iowa

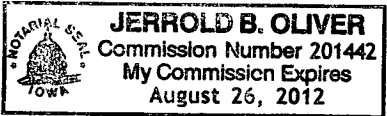


EXHIBIT "A"

Description of Real Estate

Parcel 11B of Fieldstone Addition to the City of Winterset, Madison County, Iowa, and an undivided 1/22nd interest in the common areas and facilities of Fieldstone Townhouses as shown in the Declaration of Covenants, Conditions and Restrictions of Fieldstone Townhouses recorded in Town Lot Deed Record 59, Page 634 of the Recorder's Office of Madison County, Iowa.

There is no separate apartment number for the townhouse located on the parcel covered by this Real Estate Contract. The apartment or townhouse is identified by the parcel designation set forth above. The exact description of the above-described parcel is set forth in a Plat of Survey for Lots Four (4) through Fifteen (15), Fieldstone Addition to the City of Winterset, Madison County, Iowa, recorded September 23, 1994, in Book 2, Page 226 of the Office of the Madison County, Iowa, Recorder. This Real Estate Contract, pursuant to the above-described Declaration, includes a 1/22 undivided interest in the common areas and facilities of Fieldstone Addition, which rounds to the nearest one-hundredth of a percent to a 4.55% undivided interest.