



IOWA DISTRICT COURT

FOR POLK COUNTY

IN THE MATTER OF THE ESTATE OF

PROBATE NO. 31 CIT NO. 208

CHARLES E. BEENER

REPORT AND INVENTORY

DECEASED

Regular estate (Chapter 633)   
Small estate (Chapter 635)   
CIT (Chapter 450.22)

The undersigned Executor , Administrator , or other Daughter (capacity)

whose name and post office address is: Dixie L. Henderson  
2530 Glenbrook Drive  
Des Moines, Iowa

reports as follows:

Name of Decedent	Age	Last Residence	Date of Death	Social Security Number
Charles E. Beener	L	367 Christi Lane Des Moines, Iowa	6/24/85	[REDACTED]

- The designated attorney is: Craig E. Block  
whose address and telephone number is: 110 SE Grant, Suite 205, Ankeny, Iowa 50021
- Will a Federal Estate Tax Return be filed? Yes , No .
- The decedent died testate , intestate .
- If testate, was a child born to or adopted by decedent after execution of the Will? Yes , No . If yes, include each such child in 6. below:
- Did decedent leave a surviving spouse? Yes , No .
- List (a) surviving spouse, if any, (b) beneficiaries under decedent's will, (c) heirs at law in intestate proceedings, (d) transferees, and (e) surviving joint tenants. If any person takes by representation, list that person and the deceased person through whom such person takes.

Name	Age	Post Office Address	Relationship to Decedent	Social Security Number
Pauline Beener REC \$ <u>25.00</u> AUD \$ _____ R.M.F. \$ <u>1.00</u> COMPUTER <input checked="" type="checkbox"/> RECORDED <input checked="" type="checkbox"/> COMPARED <input checked="" type="checkbox"/>	64	367 Christi Lane Des Moines, Iowa	Spouse	[REDACTED]

**CERTIFICATE**  
I, Jerry L. Weiss, Clerk of the District Court of the State of Iowa, and for Polk County, do hereby certify that this is a true and complete copy of the Original Instrument filed in this office.  
IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed the Seal of said Court at my office in Des Moines, Iowa, this 15 day of April, 1985.  
By Jerry L. Weiss Deputy  
JERRY L. WEISS  
Clerk of the District Court

RECEIVED  
POLK COUNTY  
JERRY L. WEISS  
CLERK DISTRICT COURT  
1988 NOV 18 AM

FILED NO. 2782  
BOOK 42 PAGE 197  
94 APR 14 PM 1:07  
MICHELLE UTSLER  
RECORDER  
MADISON COUNTY IOWA  
16010635

in (1)

Pauline Beener - 367 Christi Lane, DM, IA

Real Estate Contract with John and Sharon Garmon for property described as: North 1/2 of the SE 1/4 of Section 1, Township 74, Range 26, Madison County, Iowa.

Real Estate Contract with Jerry and Linda Hutchison for property described as: The E 1/2 of the W 1/2 of the NE 1/4, Section 12, Township 74, North, Range 26 West of the 5th P.M., Madison County, Iowa, containing 40 acres more or less.

Real Estate Contract with Fred Pickering which was subsequently assigned to Victor H. Lochmann, for property described as: The W 1/2 of the NW 1/4 of the NE 1/4, Section 12, Township 74 North, Range 26, West of the 5th P.M., AND the West 1/2 of the NW 1/4 of the NE 1/4, Section 12, Township 74 North, Range 26 West of the 5th P.M., Madison County, Iowa, containing 20 acres and 18 acres, more or less, respectively.

follows: (2)

in Madison County, Iowa.

The change of title to the above described real estate was made as follows: (3)

Charles E. Beener died 6-24-85; vesting title in the above described real estate in the above named joint tenant as provided for in his C.I.T.

In TESTIMONY WHEREOF, I have hereunto attached my official signature and affixed my official seal, on this 30th day of January, 19 89

JERRY L. WEISS

Clerk District Court

- (1) Give full name of person in whose name the title is established.
- (2) Give full description of the real estate.
- (3) Show how the change of title was made; if by will, give name of testator and action of court thereon (with dates), and if by decree of Court, state the title of the action, giving dates and a brief synopsis of the decree.

By

*[Handwritten Signature]*

Deputy

ESTATE OF CHARLES E. BEENER  
 SCHEDULE E JOINTLY OWNED PROPERTY WITH SURVIVING SPOUSE  
 ONLY

Item No.	Description	Value at Date of Death
1.	Residence-Lot 4 in Eivin's Heights, an Official Plat (formerly Lot 19, except the West 20 feet in Bogg's Place, an Official Plat), in the Town of Pleasant Hill, Polk County, Iowa.	\$ 65,000.00
2.	Savings Account-Union State Bank #438838	1,464.00
3.	Certificate of Deposit-Midland Financial	5,225.00
4.	Checking Account-East Des Moines National Bank	2,683.00
5.	Real Estate Contract with John and Sharon Garmon for property described as: North 1/2 of the SE 1/4 of Section 1, Township 74, Range 26, Madison County, Iowa.	11,247.00
6.	Real Estate Contract with Jerry and Linda Hutchison for property described as: The E 1/2 of the W 1/2 of the NE 1/4, Section 12, Township 74, North, Range 26 West of the 5th P.M., Madison County, Iowa, containing 40 acres more or less.	32,172.00
7.	Real Estate Contract with Fred Pickering which was subsequently assigned to Victor H. Lochmann, for property described as: The W 1/2 of the NW 1/4 of the NE 1/4, Section 12, Township 74 North, Range 26, West of the 5th P.M., AND the West 1/2 of the NW 1/4 of the NE 1/4, Section 12, Township 74 North, Range 26 West of the 5th P.M., Madison County, Iowa, containing 20 acres and 18 acres, more or less, respectively.	58,194.00
TOTAL		\$ 175,985.00
1/2 of TOTAL		87,993.00

16010637

STATE BAR ASSOCIATION  
Mark Registered, State of Iowa, 1967

FOR THE LEGAL EFFECT OF THE USE  
OF THIS FORM, CONSULT YOUR LAWYER



### QUESTIONNAIRE AND RECAPITULATION

Answer all questions

ATTACH ONLY SCHEDULES APPLICABLE. If Schedule is not attached, state NONE.

- A. Did the decedent at time of death own any real estate not held in joint tenancy?  
If yes, complete Schedule A. \$ 0.00 A
- B. Did decedent at time of death own any stocks or bonds not held in joint tenancy?  
If yes, complete Schedule B. \$ 0.00 B
- C. Did decedent at time of death own any mortgages, notes or cash not held in joint tenancy?  
If yes, complete Schedule C. \$ 0.00 C
- D. Is there any insurance on the life of the decedent?  
If yes, complete Schedule D. \$ 0.00 D
- E. Did decedent at time of death own any property held in joint tenancy with spouse?  
If yes, complete Schedule E. \$ 87,993.00 E
- E-1 Did decedent at the time of death own any property held in joint tenancy with others?  
If yes, complete Schedule E-1. \$ 0.00 E-1
- F. Did decedent at time of death own any other property not shown on any other schedule?  
If yes, complete Schedule F. \$ 0.00 F
- F-1 If intestate or election to take against the Will, did decedent at the time of death own any property exempt from execution?  
If yes, complete Schedule F-1. \$ 0.00 F-1
- G. Did decedent transfer any property by deed, grant, sale, gift, or transfer of any nature in contemplation of or within 3 years prior to death or in which decedent retained a life estate or possession until death, or to become effective at death, without full consideration?  
If yes, complete Schedule G. \$ 0.00 G

- H. Did any other property pass by reason of the exercise of power of appointment given to decedent by will, deed or other instrument?  
If yes, complete Schedule H. \$ 0.00 H
  - I. Did the decedent own or have an interest in any annuities, supplementary or other income contracts, retirement benefits, or pension funds?  
If yes, complete Schedule I. \$ 0.00 I
- |   |                            |
|---|----------------------------|
| TOTAL OF SCHEDULES  | \$ <u>87,993.00</u>        |
| Less exclusions, if any (Before exemptions and deductions.) | (\$ <u>0.00</u> )          |
| <b>SUBTOTAL</b>   | <b>\$ <u>87,993.00</u></b> |
| Less Mortgages and estimated debts                          | (\$ <u>3,000.00</u> )      |
| <b>TOTAL</b>  | <b>\$ <u>84,993.00</u></b> |

INFORMATION RESPONSIVE TO SECTIONS 633.361.9, .12 AND .13, THE CODE.

1. Did the decedent die owning real estate located outside the State of Iowa not otherwise reported?  
If yes, attach Schedule showing extent of interest, legal description, and estimated value. \$ \_\_\_\_\_
2. Is any other property required to be reported for federal estate tax or Iowa inheritance tax purposes which has not been reported on Schedules A through I?  
If yes, attach Schedule showing items and values. \$ \_\_\_\_\_
3. Was any gift made by decedent that reduced the amount of the unified credit available for federal estate tax purposes?  
If yes, attach Schedule showing the description and value of the gift, date and amount of unified credit claimed. \$ \_\_\_\_\_

#### CERTIFICATION

I certify under penalty of perjury and pursuant to the laws of the State of Iowa that the preceding is true and correct.

Date	Capacity or Title	Signature
November, 1988	Daughter	<i>Dijia L. Henderson</i>

Estate of Charles E. Beener, Deceased.

16010638

10-087

STATE OF IOWA  
DEPARTMENT OF REVENUE AND FINANCE  
DES MOINES, IOWA 50319

Date: November 18, 1988

Estate No. 411091

County: Polk

Probate No. 56-266-11

INHERITANCE TAX CLEARANCE

31-202

Estate of: Charles E. Beener

Tax Paid: 0

Upon examination of the return and the ~~return~~ <sup>FILED IN POLK COUNTY</sup> with the Department it is certified that:

Iowa inheritance tax has been ~~paid~~ <sup>paid</sup> in full by ~~Craig Block~~ <sup>JERRY L. WEISS</sup>  
Ankeny, Ia

No inheritance tax is due the State of Iowa

RECEIVED  
POLK COUNTY, IA

16010805

DIRECTOR OF REVENUE

By

*Paul Burkman*

625-0637