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LISA SMITH, COUNTY RECORDER MADISON COUNTY IOWA

CHEK

## AFFIDAVIT RE: REAL ESTATE EXEMPT FROM IOWA INHERITANCE TAX AND FEDERAL ESTATE TAX

## **Recorder's Cover Sheet**

Preparer Information: (Name, address and phone number)

Trent Groetken P.O. Box 158 306 Audubon St. Adair, IA 50002

Phone: (641) 742-5231

Taxpayer Information: (Name and complete address)

Lloyd David Palmitier Trust dated March 16, 2011 414 NE 6<sup>th</sup> Street

Ankeny, IA 50021

Return Document to: (Name and complete address)

Fisher, Fisher & Groetken, P.C. PO Box 158
306 Audubon St. Adair, IA 50002

**Grantors:** 

**Grantees:** 

Lloyd David Palmitier Trust dated March 16, 2011

Alec D. Palmitier

Legal description: See Page 2

## AFFIDAVIT RE: REAL ESTATE EXEMPT FROM IOWA INHERITANCE TAX AND FEDERAL ESTATE TAX

STATE OF IOWA

:ss.

POLK COUNTY

I, ALEC D. PALMITIER, being duly sworn, depose and state:

- 1. I am the surviving child of LLOYD DAVID PALMITIER, who died on the 27<sup>th</sup> day of June. 2012.
- 2. That LLOYD DAVID PALMITIER, at the time of his death, was the Trustor of the LLOYD DAVID PALMITIER TRUST dated March 16, 2011, as amended.
- 3. At the time of LLOYD DAVID PALMITIER'S death, the LLOYD DAVID PALMITIER TRUST dated March 16, 2011, as amended, owned the following described real estate located in Madison County, Iowa, to-wit:

An undivided One-half (1/2) interest in The North Half (N½) of the Northeast Quarter (NE¼) of the Southwest Quarter (SW1/4) of Section Twenty-Seven (27), Township Seventy-four (74) North, Range Twenty-seven (27) West of the 5<sup>th</sup> P.M., Madison County, Iowa.

- 4. Form 706, United States Estate Tax return, IS NOT required to be filed as a result of the death of LLOYD DAVID PALMITIER.
- 5. An lowa Inheritance Tax return is not required to be filed pursuant to Iowa Code Section 450.22 subsection 3.

Dated this 21st day of December, 2017.

ALEC D. PALMITIER

Subscribed and sworn to before me this  $21^{5+}$  day of 100

TRENT GROETKEN Commission Number 199694 MY COMMISSION EXPIRES DECEMBER 15, 2019

State of Iowa