



From the office of Jenny Fields, CFA
Martin County Property Appraiser

RE: CERTIFICATE OF TRUST – HOMESTEAD EXEMPTION

Dear Homeowner(s):

Our office has received a recorded document that transfers the title of your homesteaded property into a Trust(s). This transfer may affect your homestead exemption status. Florida law requires our office to identify who is entitled to the use and occupancy of the property. To facilitate this process, we require one of the following:

- **Certificate of Trust**

This form should be completed by your attorney and his/her signature should be notarized. It is to be completed for the person(s) who is/are entitled to the use and occupancy of the property, as to an equitable life estate. This would also be the person(s) benefitting from the trust in his/her/their lifetime.

- **The Opportunity to Review Your Trust in its Entirety**

One of our professionals will review the trust to determine if it is clear who has current beneficial interest under the terms of the trust. If we cannot clearly identify this information, we will make a copy of your trust for further review by the Property Appraiser and/or our attorney. If you elect to have our Office review your trust, please call 772-288-5608 to schedule an appointment in our **Stuart** office.

Please do not delay in responding to this request, as failure to do so may result in the removal of your homestead exemption and accrued Save Our Homes Benefit.

Sincerely,

Susan Litzenburg

Customer Service & Exemption Department Manager

Representing Jenny Fields, CFA ♦ Martin County Property Appraiser

772-288-5608 ♦ hx@pa.martin.fl.us

3473 SE Willoughby Blvd., Suite 101, Stuart, FL 34994

"We VALUE Martin!"

Website: www.pa.martin.fl.us





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Martin County Property Appraiser

Certificate of Trust

I _____,
(Attorney's Name)

HEREBY CERTIFY THAT _____
percent eligible % _____ (Beneficiary Name(s))

is/are entitled to the use and occupancy as to an equitable life estate in Real Property under the terms of the:

(Name Of Trust)

trust dated _____; therefore, having sufficient title to claim homestead exemption in compliance with Rules of the State of Florida, Department of Revenue, Division of Ad Valorem Tax, Chapter 12D-7.011 (AGO 94-50 and AGO 90-70).

Is this a Qualified Personal Residence Trust? ☐ Yes ☐ No. If Yes, what is the expiration year? _____

Is there a Personal Property Clause contained in the Deed or Trust? ☐ Yes ☐ No (Meaning: The beneficiary interest under this Trust is for personal property only and not in the title, legal or equitable, of real estate.)

Is this a Community Property Trust or does the Trust contain a Community Property Clause? ☐ Yes ☐ No

Parcel Identification Number: _____

Property Address: _____

Attorney Signature _____ Print Name _____

State of _____
County of _____

SWORN TO and subscribed before me by means of () physical presence or () online notarization, this date of _____ by _____ who: is/are () personally known to me or () has/have produced a driver's license as identification.

(Notary Seal)

Notary Signature _____

Printed Notary Name _____

"We VALUE Martin!"