



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. In order to continue the Homestead Exemption, it will be necessary for you to have your attorney complete the attached "Certificate of Trust", certifying entitlement to the use and occupancy of the property. We will need a "Certificate of Trust" for each trust that holds title to the property.

The form should 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) benefiting from the trust in his/her/their lifetime.

The "Certificate of Trust" must be returned to the Property Appraiser's office no later than 30 days from the receipt of this letter. Our office cannot continue the Homestead Exemption on your property without receipt of this certificate. Please do not delay in returning this form, as it may result in the denial of your Homestead Exemption.

PLEASE RETURN THE COMPLETED, SIGNED & NOTARIZED CERTIFICATE ATTACHED TO:

Address:

Martin County Property Appraiser
Exemption Department
3473 SE Willoughby Blvd., Suite 101
Stuart, FL 34994

OR

Email:

HX@pa.martin.fl.us

Sincerely,

Karen Leary

Customer Service & Exemption Department Manager

Representing Jenny Fields, CFA ♦ Martin County Property Appraiser

772.223.7955 ♦ karen.leary@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 CERTIFIED THAT _____
percent eligible % _____ (Beneficiary Names)

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 94-55 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.)

Parcel Identification Number: _____

Legal Description: _____

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 Signature _____

(Notary Seal)

Printed Notary Name _____

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