



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 is necessary 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 at the address or email noted below my signature within 30 days. Please do not delay returning this completed certificate. Failure to provide this Certificate of Trust within 30 days will result in the removal of your homestead exemption.

Sincerely,



Kayla Sullivan
Public Services & Exemptions Department Manager

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“We VALUE Martin!”

Website: www.pamartinfl.gov





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Martin County Property Appraiser

CERTIFICATE OF TRUST

I _____,
(Attorney's Name)

HEREBY CERTIFY THAT _____
(Beneficiary/Beneficiaries Name)

percent eligible _____%

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 date _____; 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
(If yes, the beneficiary interest under this Trust is for personal property only and not in the title, legal or equitable, of real estate - meaning the beneficiary is **not** eligible to claim homestead exemption.)

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 _____, 20____ by _____ who:
is/are () personally know to me or () has/have produced a driver's license or photo ID as identification.

Notary Signature _____

(Notary Seal)

Printed Notary Name _____

"We VALUE Martin!"

