

Preparer: Matthew J. Kriegel, 1921 – 51st Street NE, Cedar Rapids, IA 52402, (319) 393-1020
Return to / Address Tax Statement: Shelli J. Wilcox, 1357 Hillside Dr NW, Cedar Rapids, IA 52405

Affidavit Of Surviving Joint Tenant For Change Of Title To Real Estate

STATE OF IOWA, COUNTY OF LINN, ss:

I, Shelli J. Wilcox, being first duly sworn on oath, depose and state as follows:

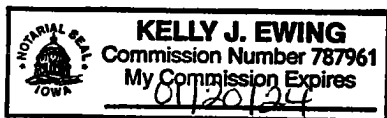
1. I am the Executor of the Estate of Shirlee U. Wilcox, who died January 20, 2016. Shirlee U. Wilcox was the surviving joint tenant of Vernus J. Cassidy, who died on September 25, 2011.
2. The following described real estate was owned only by Vernus J. Cassidy, and Shirlee U. Wilcox, as joint tenants with full rights of survivorship at the time of Vernus J. Cassidy's death:

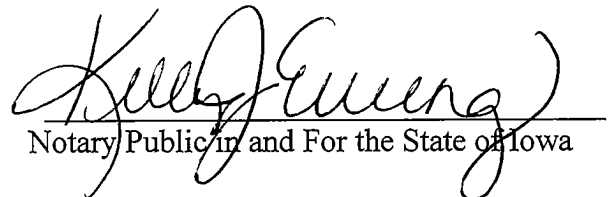
Lot Two (2) of Logan's First Subdivision of Part of the North one-half (N ½) of Section Twenty-Three (23), Township Eighty-Eight (88) North, Range Five (5), West of the Fifth Principal Meridian, according to plat recorded in Book 4 Plats, Page 46; also, all lake frontage running to the middle of the Maquoketa River bed with respect to said premises
3. Title to Lot Two (2) was conveyed to the Shirlee U. Wilcox by a document filed on May 4, 1987 in Book 120, L.D., Page 317, of the records of the Delaware County, Iowa Recorder, but not the lake frontage thereto.
4. Vernus J. Cassidy was the joint tenant of the lake frontage of Lot 2, until his death on September 25, 2011. His death occurred more than 10 years ago which addresses Iowa Title Standard 9.9 for Iowa Inheritance taxes.
5. I hereby request that the auditor enter this information on the transfer books pursuant to Section 558.66 of the Iowa Code.
6. The undersigned Affiant is the child of Shirlee U. Wilcox, Decedent and the Executor of the Estate of Shirlee U. Wilcox.
7. Form 706, United States Estate Tax return, **IS NOT** required to be filed as a result of the death of the Decedent; Vernus J. Cassidy.

8. An Iowa inheritance tax return is not required to be filed pursuant to section 450.22(3) for the Decedent; Vernus J. Cassidy.


Shelli J. Wilcox

Signed and sworn to (or affirmed) before me on 28th Sept 2021, by Shelli J. Wilcox.




Notary Public in and For the State of Iowa