

BK: 2022 PG: 433
Recorded: 2/11/2022 at 8:36:57.0 AM
Pages 4
County Recording Fee: \$22.00
Iowa E-Filing Fee: \$3.00
Combined Fee: \$25.00
Revenue Tax:
LISA SMITH RECORDER
Madison County, Iowa

FOR RECORDING PURPOSES

AFFIDAVIT THAT NO INHERITANCE TAX IS DUE

PREPARED BY:

Patrick A. Tefft
Dvorak Law Group, LLC
9500 West Dodge Road, Suite 100
Omaha, NE 68114
(402) 933-4770

SEND TAX STATEMENTS TO:

Aura E. Whitney-Jackson, Trustee
220 S. 31st Ave.
#3200
Omaha, NE 68131

RETURN ADDRESS:

Patrick K. Kenney
Dvorak Law Group, LLC
9500 West Dodge Road, Suite 100
Omaha, NE 68114

GRANTORS:

Aura E. Whitney-Jackson, as successor Trustee of the Andrew F. Jackson Trust amended and restated dated November 17, 2017, together with any amendments thereto.

GRANTEE:

Aura E. Whitney-Jackson, as successor Trustee of the Aura E. Whitney-Jackson Trust amended and restated dated June 17, 2020, together with any amendments thereto.

LEGAL DESCRIPTION:

See page 1 of Affidavit That No Inheritance Tax is Due

DOCUMENT OR INSTRUMENT NUMBER OF PREVIOUSLY RECORDED DOCUMENTS:

Book 2015, Page 3823, Book 2017, page 3970, and Book 2019, page 667

AFFIDAVIT THAT NO INHERITANCE TAX IS DUE

STATE OF NEBRASKA)
) ss.
COUNTY OF DOUGLAS)

I, Aura E. Whitney-Jackson, being first duty sworn on oath, depose and state as follows:

1. I am the surviving spouse of Andrew F. Jackson ("Decedent") who died on the 24th day of June, 2018, and also the successor Trustee of the Andrew F. Jackson Trust amended and restated dated November 17, 2017, together with any amendments made thereto ("Trust").

2. There were and will be no estate proceedings instituted in Iowa on account of the Decedent's death.

3. Pursuant to Section 450.22, subsection 3 of the Iowa Code, no inheritance tax return is required to be filed in the Estate of Andrew F. Jackson since (i) there is no federal estate tax filing obligation, and (ii) all of the Decedent's assets either were held in joint tenancy with right of survivorship solely between the decedent and individuals listed in Section 450.9 of the Iowa Code as individuals that are entirely exempt from Iowa Inheritance Tax, or passed by beneficiary designation or pursuant to a trust intended to pass the decedent's property at death or through any other nonprobate transfer solely to individuals listed in Section 450.9 as individuals that are entirely exempt from Iowa inheritance tax.

4. The following described real estate was owned by the Trust, at the time of the Decedent's death:

The Northeast Quarter (NE1/4) of the Northeast Quarter (NE1/4) of Section Thirty-Two (32), all in Township Seventy-Six (76) North, Range Twenty-Six (26) West of the 5th P.M., Madison County, Iowa, as surveyed, platted and recorded.

AND

All of the West 147 feet of the North Half of the Southeast Quarter of the Southeast Quarter (N1/2 SE1/4 SE1/4), which lies South of the South line of Highway #92, and the South Half of the Southeast Quarter of the Southeast Quarter (S1/2 SE1/4 SE1/4) of Section Twenty-Nine (29), in Township Seventy-Six (76) North, Range Twenty-Six (26) West of the 5th P.M., Madison County, Iowa,

EXCEPT

All that portion of the following described real estate lying North of Middle River as the same now runs through said real estate as follows:

All of the West 147 feet of the North Half of the Southeast Quarter of the Southeast Quarter (N1/2 SE1/4 SE1/4), which lies South of the South line of Highway #92, and the South Half of the Southeast Quarter of the Southeast Quarter (S1/2 SE1/4 SE1/4) of Section Twenty-Nine (29) in Township Seventy-Six (76) North, Range Twenty-Six (26) West of the 5th P.M., Madison County, Iowa.

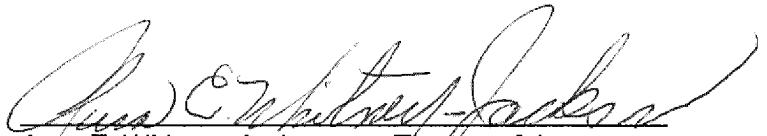
5. This Affidavit is filed pursuant to Section 450.22, subsection 4 of the Iowa Code for the purpose of establishing of record nonliability for Iowa inheritance tax without the filing of an inheritance tax clearance.

6. This Affidavit is further filed to clear title to the real estate described herein.

7. We hereby request that the Auditor enter this information on the transfer books pursuant to Section 558.66 of the Iowa Code.

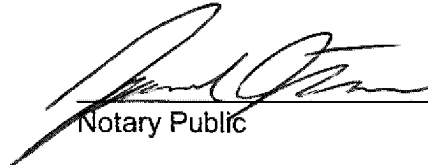
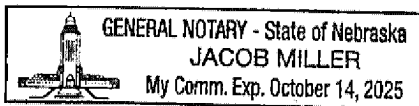
[Remainder of this page intentionally left blank; signature page to follow.]

Dated: 2-3-22



Aura E. Whitney-Jackson, as Trustee of the
Andrew F. Jackson Trust amended and restated
dated November 17, 2017, together with any
amendments thereto.

SUBSCRIBED AND SWORN to before me this 3 day of February 2022,
2022, by Aura E. Whitney-Jackson, as Trustee of the Andrew F. Jackson Trust.


Notary Public