



Document 2026 2803

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BRANDY MACUMBER, COUNTY RECORDER
MADISON COUNTY IOWA

**AFFIDAVIT OF SURVIVING JOINT TENANT
FOR CHANGE OF TITLE TO REAL ESTATE
Recorder's Cover Sheet**

Preparer Information: Trevor J. Heimbaugh, 101 1/2 W. Jefferson, Winterset, IA 50273, Tel:
515-462-3731

¹/₃ **Taxpayer Information:** Shirley A. Roach, 503 E Jefferson, Winterset, IA 50273

☒ **Return Document To:** Shirley A. Roach, 503 E Jefferson, Winterset, IA 50273

Grantors:
William J. Roach

Grantees:
Shirley A. Roach

Legal Description: See Page 2

Document or instrument number of previously recorded documents: _____



**AFFIDAVIT OF SURVIVING JOINT TENANT
FOR CHANGE OF TITLE TO REAL ESTATE**

STATE OF IOWA, COUNTY OF MADISON, ss:

I, Shirley A. Roach, being first duly sworn on oath, depose and state as follows:

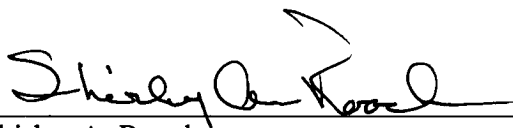
1. I am the surviving joint tenant of William J. Roach, who died on May 29, 2022.
2. The following described real estate was owned only by William J. Roach and this Affiant, as joint tenants with full rights of survivorship at the time of William J. Roach's death:

Lots Five (5), Six (6) and Eight (8) in Block One (1) of Guiberson's
Addition to the Town of Winterset, Madison County, Iowa.

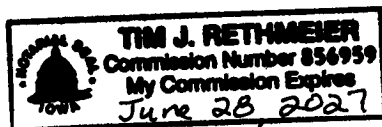
AND

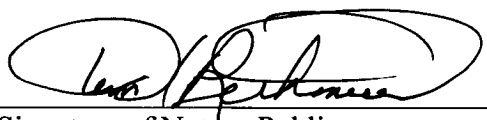
The North Half (N 1/2) of Lots Seven (7) and Eight (8) in Block Nineteen
(19) of West Addition to the City of Winterset, Madison County, Iowa.

3. Title was conveyed to the surviving joint tenant and decedent by instrument filed on May 16, 1990, in Book 55, Page 757, July 7, 2007, in Book 2007, Page 2821, and July 22, 2014, in Book 2014, Page 1753.,
4. I hereby request that the auditor enter this information on the transfer books pursuant to Section 558.66 of the Iowa Code.
5. The Affiant is the Spouse of the Decedent. (For deaths occurring after July 1, 1997, parents, grandparents, great-grandparents, and other lineal ascendants, children including legally adopted children and biological children entitled to inherit under the laws of Iowa, stepchildren, and grandchildren, great-grandchildren, and other lineal descendants are exempt from Iowa inheritance tax.)
6. Form 706, United States Estate Tax return, **IS NOT** required to be filed as a result of the death of the Decedent.
7. An Iowa inheritance tax return is not required to be filed pursuant to section 450.22 subsection 3.


Shirley A. Roach

Signed and sworn to (or affirmed) before me on September 18, 2026 by
Shirley A. Roach.




Signature of Notary Public