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From the office of Jenny Fields, CFA  
Martin County Property Appraiser

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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. Please do not delay in returning this completed certificate as it may result in the removal of your homestead exemption.

Sincerely,

**Susan Litzenburg**

**Customer Service & Exemption Department Manager**

Representing Jenny Fields, CFA ♦ Martin County Property Appraiser

772.288.5608 ♦ [hx@pa.martin.fl.us](mailto:hx@pa.martin.fl.us)

Homestead Exemption Department

3473 SE Willoughby Blvd., Suite 101, Stuart, FL 34994

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*“We VALUE Martin!”*

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Website: [www.pa.martin.fl.us](http://www.pa.martin.fl.us)





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Martin County Property Appraiser

### Certificate of Trust

I \_\_\_\_\_,  
(Attorney's Name)

HEREBY CERTIFY THAT \_\_\_\_\_  
percent eligible % \_\_\_\_\_ (Beneficiary Name(s))

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 94-50 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 (Meaning; The beneficiary interest under this Trust is for personal property only and not in the title, legal or equitable, of real estate.)

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 \_\_\_\_\_ 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 \_\_\_\_\_

*"We VALUE Martin!"*