



Form IH-TA

SF# 48832
(R2/04-07)

STATE OF INDIANA }
COUNTY OF _____ } SS:

IN THE MATTER OF THE ESTATE OF _____ }
_____, DECEASED. }

Social Security Number _____ - ____ - _____

AFFIDAVIT OF TRANSFEREE OF TRUST PROPERTY THAT NO INDIANA INHERITANCE OR ESTATE TAX IS DUE ON THE TRANSFER

Comes now _____, being first duly sworn upon his/her oath, says that:

1. Transferee, _____, is a trust beneficiary, successor trustee (*strike inappropriate terms*) of the _____ Trust, under agreement dated and signed on the ____ day of _____, 20____ and last amended on the ____ day of _____, 20____.
(month) (year)

2. That the original grantor _____, of the trust died on the ____ day of _____, 20____, a resident of _____, County, Indiana.
(year) (month)

3. Transferee (a) is domiciled in Indiana, or (b) is a representative of _____, a corporation doing business in Indiana. (*Strike either (a) or (b), whichever is not pertinent.*)

4. That the following personal property sought to be transferred is held by the trust:

Holding Institution	Account Number	Description of Property	Date of Death Value

5. That the transfer of the trust personal property is not subject to Indiana inheritance or estate tax for the following reason:

6. Transferee, by making this affidavit, says that the above trust personal property will be transferred to him/her and is not subject to Indiana inheritance or estate tax and further says, under the penalties for perjury, that the statements herein are true and correct to the best of such person's knowledge and belief.

Signature of transferee

Name (typed or printed)

Address

STATE OF INDIANA)
) SS:
COUNTY OF _____)

Before me, a Notary Public in and for _____ County, State of _____, personally appeared _____, who acknowledged execution of the foregoing document and who, being duly sworn, stated the representations contained herein to be true.

WITNESS my hand and Notarial Seal this _____ day of _____, _____.

(Signature) _____

(Printed) _____

Notary Public

SEAL

My commission expires: _____

NOTE: This affidavit must immediately be filed with the Indiana Department of Revenue, Inheritance Tax Division, 100 N. Senate Avenue, Room N248, Indianapolis, Indiana 46204-2253.