

Preparer Information: \_\_\_\_\_

Address Tax Statement To: \_\_\_\_\_

Return Document To: \_\_\_\_\_

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

**STATE OF \_\_\_\_\_, COUNTY OF \_\_\_\_\_} ss:**

I, \_\_\_\_\_, being first duly sworn on oath, depose and state as follows:

1. \_\_\_\_\_ was the surviving joint tenant of \_\_\_\_\_  
who died on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, in \_\_\_\_\_ County,  
State of \_\_\_\_\_.

2. The following described real estate was owned only by \_\_\_\_\_ and  
\_\_\_\_\_ as joint tenants with full rights of survivorship at the time of  
\_\_\_\_\_’s death:

3. I hereby request that the Auditor enter this information upon the transfer books pursuant to  
Section 558.66 of the Iowa Code.

4. This Affiant \_\_\_\_\_ is the \_\_\_\_\_  
of the Decedent. (For deaths occurring after July 1, 1997, parents, grandparents, great-grandparents, and  
other lineal ascendants, children including legally adopted children & 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).

5. Form 706, United States Estate Tax return \_\_\_\_\_ \* required to be filed as a result of the death of Decedent.

6. An Iowa inheritance tax return is not required to be filed pursuant to Section 450.22 subsection 3.

\_\_\_\_\_

**SUBSCRIBED AND SWORN TO** before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public in and for the State of Iowa  
My commission expires \_\_\_\_\_

\*The correct option must be selected to determine whether the Iowa Estate Tax may constitute a lien on the above described property