



## SAMPLE OF TRUST DOCUMENTS REQUIRED FOR HOMESTEAD

If property is now included in a trust, please provide:

1. a copy of the FIRST PAGE
2. a copy of the SIGNATURE PAGE(S)
3. the portion of the trust that includes a HOMESTEAD clause **OR** a GRANTORS/DONORS rights clause. (*Examples Below*)

### **HOMESTEAD EXAMPLE:**

Notwithstanding any other provisions contained herein, the Settler reserves the right to reside in the Settler's residence if placed in this Trust for as long as the Settler lives or an indefinite period, it being the intent to retain the requisite beneficial interest and possessory rights in and to such real property to be entitled to claim the homestead property tax exemption. The Settler's interest in any real property in which the Settler resides pursuant to the provisions of this Trust shall be deemed to be an interest in real property and not Personal and shall be deemed the homestead of the Settler.

### **RIGHTS RESERVED BY THE GRANTOR EXAMPLE:**

Notwithstanding anything contained to the contrary herein, the Grantor reserves the following rights, privileges, and powers: The Grantor reserves the right, during the Grantors life, to amend or modify in any manner the provisions of this agreement. The Grantor also reserves the right during the grantors life to revoke this agreement, either in whole or in part. In case of any such revocation, the trustee shall transfer and deliver to the Grantor the property with respect to which such revocation applies, but the trustee first shall be entitled to reimbursements of any advances made by the trustee in the execution of the trust.

If you are unable to locate this information or need any further assistance you may contact our office at (407)665-7506 or via email to [exemptions@scpafl.org](mailto:exemptions@scpafl.org)