

# Property Exemptions Trust & Life Estate Certification Form

If a property is held in a trust, or if a life estate has been granted in the property, you can complete and submit this form to document eligibility for a personal property tax exemption or abatement. If you submit this completed and signed form with your exemption or abatement application, you do not need to include a copy of the full trust document or documentation of the life estate, unless the Department of Finance requests it to verify your eligibility. Complete only the sections of the form that apply to your situation.

## Section 1: Property Information

BOROUGH	BLOCK	LOT	
STREET ADDRESS			UNIT OR APT # (IF APPLICABLE)
CITY	STATE	ZIP CODE	

Applicant owner mailing address (if different from property address):

STREET ADDRESS		UNIT OR APT # (IF APPLICABLE)
CITY	STATE	ZIP CODE

## Section 2: Trust Information

NAME OF TRUST:	DATE THE TRUST WAS CREATED (MM/DD/YYYY):
NAME OF TRUST CREATOR:	
NAME OF BENEFICIARY:	Primary resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
NAME OF BENEFICIARY:	Primary resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
NAME(S) OF TRUSTEE:	Primary resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
NAME(S) OF TRUSTEE:	Primary resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
Please attach additional pages as necessary to list all trust beneficiaries and trustees.	

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### Section 3: Life Estate Information

Is there a life estate deed? <input type="checkbox"/> Yes <input type="checkbox"/> No	
IF THERE IS A LIFE ESTATE, PLEASE LIST THE NAME OF LIFE ESTATE HOLDER:	

### Section 4: Certification

I, \_\_\_\_\_, certify that the information provided above is a true and accurate summary of  
(NAME OF APPLICANT)  
the trust documents pertaining to the property identified. I understand that this information is subject to audit and that if the Department of Finance determines that I have made false statements, I may lose my future benefits and be responsible for all applicable charges and penalties.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(MM/DD/YYYY)