

AFFIDAVIT AS TO TERMS OF TRUST  
FOR HOMESTEAD EXEMPTION

STATE OF FLORIDA  
COUNTY OF CHARLOTTE

THE UNDERSIGNED, first being duly sworn, deposes and states:

1. I am the designated (please check all that apply)

\_\_\_\_\_ trustee          \_\_\_\_\_ beneficiary          \_\_\_\_\_ settlor of the Trust,

and I have personal knowledge of the facts set forth in this Affidavit.

2. Are you a permanent resident of the State of Florida? \_\_\_\_\_ Yes or \_\_\_\_\_ No.

3. Do you reside on the real property and make it your permanent residence? \_\_\_\_\_ Yes  
or \_\_\_\_\_ No.

4. Does the Trust entitle you to immediately use and occupy the real property you assert is  
your homestead? \_\_\_\_\_ Yes or \_\_\_\_\_ No.

5. That part of the trust corpus includes real estate located in Charlotte County, Florida (“the  
real estate”), more particularly described as \_\_\_\_\_  
\_\_\_\_\_.

**ITEM #6 TO BE COMPLETED FOR QUALIFIED PERSONAL RESIDENCE TRUSTS ONLY:**

6. The Trust is a Qualified Personal Residence Trust, with a term of \_\_\_\_\_ years. I qualify  
for the homestead exemption in accordance with Robbins v. Welbaum, 664 So. 2d 1 (Fla. 3d DCA 1995).

IN WITNESS WHEREOF, I have signed this Affidavit under penalty of perjury on this \_\_\_\_\_  
day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

SWORN TO and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, by  
\_\_\_\_\_, who is personally known to me or who  
produced \_\_\_\_\_ as identification, and who did take an oath.

\_\_\_\_\_  
(Signature of Notary Public-State of Florida)

(Seal)

\_\_\_\_\_  
(Name of Notary-Typed, Printed or Stamped)