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4-7-25
FL

(Requestor's Name)

(Address)

(Address)

(City/State/Zip/Phone #)

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WAIT

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MAIL

(Business Entity Name)

(Document Number)

Certified Copies _____ Certificates of Status _____

Special Instructions to Filing Officer:

W25000038216 FL 3-21-25

W25000024511

Office Use Only



800444470458

02/12/25--01022--027 **350.00

02/12/25 12:05

MS

TRANSMITTAL LETTER

Department of State
Division of Corporations
P.O. Box 6327
Tallahassee, FL 32314

SUBJECT: Turcotte Family Trust

Enclosed is an original and one (1) copy of the Declaration of Trust and a check for:

FEES:

Declaration of Trust \$350.00

OPTIONAL:

Certified Copy \$ 8.75

FROM: Robert W & Kathleen A Turcotte
Name (Printed or typed) Kathleen A Turcotte
7588 Novara Ct
Address
Naples FL 34114
City, State & Zip
651-329-5312 + 651-220-0766
Daytime Telephone number



City of Bradenton Application for Local Business Tax

Please complete and return to: 101 Old Main Street – Bradenton, FL 34205

Business Name: Turcotte Family Trust

DBA Name: Robert W Turcotte + Kathleen A Turcotte

Business Address: 6001 21 Ave W

City / State / Zip: Bradenton

Business Phone: 651-329-5317 651-270-0966

Email: RobertTurcotte42@gmail.com
Balsambabe10@yahoo.co

Mailing Address: 7588 Novata CT

City / State / Zip: Naples FL 34114

Contact: Robert Turcotte Kathleen A. Turcotte

FEIN or SSN: 398-38-1194 474-48-7780

Per Florida Statute 205.0535 (5), the Social Security Number (SSN) is required only if the Federal Employers Identification Number (FEIN) has not been provided on the application.

Type of Business / Business Description: Leasing one unite

Number of employees, seats, rental units, works stations, machines, etc. (as applicable): N/A

Applicant must provide copies of any applicable licenses, certificates, registrations, business name registrations, etc. from the State of Florida as well as two (2) forms of identification, one including a photograph, of the individual listed as contact above. Businesses not registering a name with the State of Florida must provide a written statement that sets forth the reasons for exemption from compliance with the Fictitious Name Act.

I understand that this is an application for the City of Bradenton Local Business Tax ONLY and will at all times comply with all applicable laws, statutes, ordinances and/or regulations set forth by federal, state and/or local governments.

Signature: Robert W Turcotte Family Trust Date: Feb 4-25

CITY OF BRADENTON USE ONLY

BT Classification: RES 1 UNIT

Full year: _____ ½ year: _____ Total Fees Due: 0

Bus. Acct #: _____ Bill #: _____ Receipt #: _____

**AFFIDAVIT TO THE FLORIDA SECRETARY OF STATE
TO FILE OR QUALIFY**

Robert Turcotte

A Family TRUST

In accordance with Section 609.02 of the Florida Statutes, pertaining to Common Law Declarations of Trust, the undersigned, the Chairman of the Board of Trustees of Robert Turcotte Kathleen A. Turcotte (Name of Trust) Turcotte Family Trust hereby affirms in order to file or qualify (State) Turcotte Family Trust, in the State of Florida. (Name of Trust)

1. Two or more persons are named in the Trust.

2. The principal address is 7588 Novara Ct
WALTON FL 34114

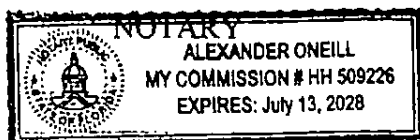
3 The registered agent and street address in the State of Florida is:
Jennifer Haubrich
9251 Warm Springs Circle Palmdale FL 34221

4. Acceptance by the registered agent: Having been named as registered agent to accept service of process for the above named Declaration of Trust at the place designated in this affidavit, I hereby accept the appointment as registered agent and agree to act in this capacity.

Robert W Turcotte Kathleen A Turcotte
(Signature of Registered Agent)

5. I certify that the attached is a true and correct copy of the Declaration of Trust under which the association proposes to conduct its business in Florida.

Alexander Oneill
Name: Alexander Oneill
Chairman of the Board of Trustees



CR2E063(3/00)

Filing Fee: \$350.00
Certified Copy: \$ 8.75 (optional)

TURCOTTE FAMILY TRUST

February 20, 2020

Prepared by
Burt E. Eisenberg, Esq.
Burt E. Eisenberg, P.A.
1152 Goodlette Road N.
Naples, Florida 34102
239-435-3232
Burt@BurtEisenbergLaw.com

FILED
FEB 20 2020
CLERK OF COURT
JUDICIAL CIRCUIT IN AND FOR
THE SEVENTH JUDICIAL CIRCUIT
IN FLORIDA
NAPLES, FLORIDA

Synopsis of Turcotte Family Trust

This abbreviated summary is for convenience only and should not be relied upon in interpreting the Trust. The Trust contains other significant provisions not described in this summary.

* The opening paragraph names Robert and Kathleen as the initial Trustees.

Robert W Turcotte Kathleen A Turcotte
Article 1 (*Identification*) identifies family members and references.

Robert W Turcotte Kathleen A Turcotte
Article 2 (*Transfers to Trust*) provides for the initial funding of the Trust with all your interest in the assets listed on Schedule A. (Please note that assets may be transferred into the Trust only by formal transfer of legal title to the Trustees. Listing assets on Schedule A does not cause those assets to be transferred to the Trust.) You have reserved the right to transfer additional assets to the Trust, if those assets are acceptable to the Trustees.

Article 3 (*Reserved Rights*) reserves for you both the right to amend or revoke this Trust at any time and to control the administration of the Trust. If a guardian is appointed for either of you, the guardian can join the other Grantor to amend the Trust to preserve tax benefits, but only if consistent with existing provisions. All of these powers can be suspended if you are disabled, as determined either by a court or by a majority of your children and the next successor Trustees if confirmed by a medical opinion. All of these powers will be restored if it is determined that you are no longer disabled.

Article 4 (*Payments During Our Lifetimes*) directs the Trustees to use the income and principal of the Trust for the benefit of both of you, even if this requires use of the entire Trust.

Article 5 (*Administration After Either Grantor's Death*) makes specific gifts of real property, and distributes the remaining Trust Estate as follows. Upon the death of the first Grantor to die, to the Trust remains intact for the Surviving Grantor. Upon the death of the Surviving Grantor, to your descendants.

Article 6 (*Standby Trust*) creates a standby trust for any amounts that might be distributable to a beneficiary (other than a Grantor) who is under age 21 or whom the Trustees deem to be incapable of handling his or her affairs.

Article 7 (*Provisions Governing Trustees*) names Jennefer Haubrich to serve as successor Trustee upon your death or if a Grantor's rights are suspended; specifies procedures if a Trustee becomes disabled; allows for the resignation of Trustees; enumerates powers and duties of successor Trustees and provides for waiver of bond and registration; directs the Trustees to provide annual accountings of assets held in trust for each beneficiary; specifies reasonable compensation for the Trustees; and provides for indemnification for the Trustees.

Article 8 (*Survival Provisions*) directs that Kathleen is deemed to have survived Robert in the event of simultaneous death. A beneficiary (other than the Surviving Grantor) is required to survive by 90 days to receive his or her devise.

Article 9 (*Protection of Interests*) protects beneficiaries from creditors and prevents them from selling their interest in the trust. (Many state laws provide exceptions for taxes, alimony, and child support.)

Article 10 (*Payments of Expenses and Taxes*) directs payment of debts and expenses in the discretion of the Trustees and directs payment of taxes from the Trust Estate, without apportionment.

Article 11 (*Fiduciary Powers*) grants broad powers to the Trustees to facilitate administration of the trusts.

Article 12 (*Environmental Provisions*) gives the Trustees powers to deal with environmental issues. The Trustees will not be held personally liable if assets in the Trust are diminished as a result of complying with environmental laws.

Article 13 (*Insurance Provisions*) directs the Trustees in the administration of life insurance policies and the collection of those proceeds at death.

Article 14 (*Savings Clauses*) declares intent to qualify for full marital deduction.

Article 15 (*Administration and Construction*) provides general instructions for interpretation and application of the terms and administration of the Trust.

Article 16 (*Miscellaneous Provisions*) includes definitions and other miscellaneous provisions.

* Robert W Turcotte Kathleen A Turcotte

7 PM 12:07

The Grantors warrant that the property is free of all encumbrances, except the lien for real estate taxes not yet due and payable and restrictions, reservations, and easements of record, and that lawful seisin of and good right to convey the property are vested in the Grantors. The Grantors hereby fully warrant the title to the property and will defend the same against the lawful claims of all persons.

Signed on February 20, 2020.

Signed in the presence of:

Print Name: Peter M. Starling

Print Name: Veronica J. Hepp

Robert W. Turcotte
Robert W. Turcotte

Kathleen L. Turcotte
Kathleen L. Turcotte

Two witnesses as to both

STATE OF FLORIDA
COUNTY OF COLLIER

The foregoing instrument was acknowledged before me by means of physical presence on February 20, 2020, by Robert W. Turcotte and Kathleen L. Turcotte.

Personally Known _____
Produced Identification ✓ _____
Type of Identification - driver's licenses _____

Notary Public--State of Florida

Print Notary Name: _____

My Commission Number is: _____

My Commission Expires: _____



BURT EISENBERG
Commission # GG 362283
Expires December 4, 2023
Bonded Thru Budget Notary Services

This instrument prepared by
and after recording return to:

Burt E. Eisenberg, Esq.
Burt E. Eisenberg, P.A.
1152 Goodlette Road N.
Naples, Florida 34102

Property Appraiser's Parcel
Identification Number 00438440203

WARRANTY DEED

The Grantors, Robert W. Turcotte and Kathleen A. Turcotte, husband and wife, whose mailing address is 7588 Novara Court, Naples, Florida 34114, in consideration of Ten and No/100 Dollars (\$10.00) and other valuable consideration received from the Grantee, hereby grants and conveys to the Grantees, Robert W. Turcotte and Kathleen A. Turcotte, as Trustees of the Turcotte Family Trust, dated February 20, 2020, whose mailing address is 7588 Novara Court, Naples, Florida 34114, the real property in Collier County, Florida, described as follows:

Lot 676, VERONAWALK PHASE 2A, according to the plat thereof, as recorded in Plat Book 42, Pages 27 through 30, inclusive, of the Public Records of Collier County, Florida.

Full power and authority are conferred upon the Grantees, as Trustees, to protect, conserve, sell, lease and encumber all interests conveyed by this instrument, and otherwise to manage and dispose of those interests, it being the intent of the Grantors to vest in the Trustees full rights of ownership as authorized and contemplated by Section 689.073, Florida Statutes.

NOTE TO PROPERTY APPRAISER: The Grantors confirm that under the terms of the Trust referred to above, the Grantors have not less than a beneficial interest for life and are entitled to a homestead tax exemption pursuant to the provisions of Florida Statute 196.041(2).