

TRANSFER TAX ACT, 1971
REVENUE AFFIDAVIT
DISPOSAL AT DEATH

(For use where Deceased Died AFTER 31st May, 1974, AND a DISPOSAL of all property, PERSONAL and Real are Deemed to take place).

Name(s) and Address(es) of person(s) to whom communication to be sent.

.....
.....
.....

In the Estate ofDeceased
I*,

make oath and say as follows :-

..... am/are trustees of a Settlement
desire to obtain a grant of
of the above named.

.....of
..... deceased who died on theday of

One/Two Thousand. Hundred and.
aged. at.

domiciled in.¹
that part of Jamaica called.

AS AT THE DATE OF THE DECEASED'S DEATH, so far as I/we have been able to ascertain, the gross value of all the property subject to the disposal on death amounts to \$.....

The aggregate amount of mortgage or other incumbrance on such property amounts to \$..... and reduces such value to \$.....

To the best of my/our knowledge and belief there is no other property, real or personal under any title whatsoever beyond that already referred to, in respect of which Transfer Tax, Estate Duty or Sucession Duty is payable on the death of the deceased.

All which is true to the best of my/our knowledge and belief.

.....

INSTRUCTIONS:

*Insert here the name, address, Taxpayer Registration Number (TRN) and description of each person who joins in the Affidavit or Affirmation.

**Insert here "Probate of the Will", or "Administration with the Will annexed of the estate", or "Administration of the estate", as the case may be.

• Please TYPE or PRINT. • Use BLACK or BLUE INK only.

NOTES

1. Where it is claimed that the Deceased was domiciled abroad at the time of his/her death, insert here the name of the Foreign Country, State or Province, as the case may be, in which he/she is considered to have then been domiciled, and strike out the rest of the paragraph. The circumstances relied upon to establish the foreign domicile should be stated in a schedule to be annexed hereto. The domicile of origin should always be given.

2. If the Deceased was more than once married, annex a statement showing the name of the surviving husband or wife, and the names of the children of the several marriages, distinguishing/differentiating them.

SWORN by the abovenamed

.....

.....

at in the Parish of

..... this day of

..... 20 Before me.



PART 1

PERSONAL PROPERTY AND REAL PROPERTY SUBJECT TO DISPOSAL			
Stock or Funds of Jamaica viz	Nominal Value	Market Price at date of death	Gross Principal Value
Stock, Funds, or Bonds of foreign Companies			
Shares, Debentures of Companies			
Options			
Leases			
Settled/Joint-Realty (Full particulars to be attached)			
Realty (The Description and situation of the Property should be such as to enable it and its boundaries to be clearly identified).			

PART 2

	AN ACCOUNT OF INCUMBRANCES UPON DISPOSAL SHOWN IN PART 1	
Nature of Debt or incumbrance and by whom created		
	An account of the Funeral Expenses of the Deceased	
The cost of Tombstone cannot be deducted		

OBSERVATIONS	ANSWERS
<p>Was the Deceased interested in any Policy of Life Assurance whereby any sum is payable to a Mortgagee consequent on his Death?</p> <p>If so, please give full particulars thereof. Did the deceased carry any form of Mortgage Insurance? If so, please give full particulars thereof</p>	

SUMMARY OF AFFIDAVIT

Gross value of Property shown on Part 1	\$ _____
Deduct Debts and Funeral Expenses	\$ _____
Net Taxable Value	\$ _____
Duty Payable	\$ _____

N.B. - Interest at the Rate of Six percent (6%) per annum shall be paid upon any of Tax outstanding from and after the expiration of Twelve Months of the Date of Death of the Deceased to the Date of Payment.