

**CERTIFICATE OF TRUST
FOR THE
STEPHAN FAMILY
LIVING TRUST**

PREPARED BY:

**THE DORCEY LAW FIRM, PLC
JOSHUA O. DORCEY, ESQ.
10181 SIX MILE CYPRESS PKWY, STE C
FORT MYERS, FLORIDA 33966
239-418-0169
JOSH@DORCEYLAW.COM
WWW.DORCEYLAW.COM**

Note to Successor Trustee:

Please contact THE DORCEY LAW FIRM, PLC, if you have any questions or need assistance in interpreting this document, the probate of the Will, or the administration of the Estate. Upon the death of Gregory A. Stephan AND/OR Angela C. Stephan, the Successor Trustee(s) are entitled to an initial consultation of up to one hour at no charge.

Note to Client:

You may contact THE DORCEY LAW FIRM, PLC, if you have any questions regarding the purpose, effect, or meaning of this document. There is no additional charge for this service.

**CERTIFICATE OF TRUST
EXISTENCE OF AUTHORITY**

We, Gregory A. Stephan and Angela C. Stephan, currently residing at 2706 SW 21st Place, Cape Coral, Florida 33914, as the Settlor, have established a revocable trust with Gregory A. Stephan and Angela C. Stephan, currently residing at 2706 SW 21st Place, Cape Coral, Florida 33914, as Trustees, this 29 day of October, 2019. The following is a verbatim synopsis of certain provisions of such agreement.

WITNESSETH:

PREAMBLE

A. (Co-Settlor Intentions) WHEREAS, we desire to create a revocable trust of certain property of which the Co-Trustees are willing to be the Trustees, and we as the Co-Settlor along with the Trustee, whether one or more ("Trustee") together desire to set forth the terms and conditions of this trust.

B. (Relationship of Co-Settlor) AND WHEREAS, Gregory A. Stephan and Angela C. Stephan are husband and wife and the term "settlor" shall refer collectively and individually to said husband and wife who are hereby designated as co-trustees. These co-trustees shall serve jointly and severally and either shall have full authority to act for the trust independently. Should either trustee become unable to serve as a co-trustee, or should either resign as a co-trustee before the natural termination of this trust, the remaining co-trustee shall thereafter serve as sole trustee. The term "trustee" as used in this trust agreement shall refer collectively to husband and wife so long as they serve as co-trustees, to the spouse who serves as sole trustee, and to the successor trustee who assumes the role of trustee.

INTENTION TO AVOID PROBATE

It is the intention of the Settlor to avoid probate through the use of this Trust Agreement. If, however, the Trustee(s) of this Trust and the Personal Representative(s) of the estate of the Settlor mutually determine that it shall be in the best interests of the beneficiaries of the Trust, and the beneficial interest of the beneficiaries shall not be hereby be altered, the Trustee(s) may subject any asset to probate to accomplish a result that would be unavailable without going thru the probate process.

We intend to create a valid trust under the laws of Florida and under the laws of any state in which any trust created under this trust document is administered. The terms of this trust prevail over any provision of Florida law, except those provisions that are mandatory and may not be waived.

TITLE

For convenience, our trust may be referred to as:

"The Stephan Family Living Trust dated October 29, 2019."

To the extent practicable, for the purpose of transferring property to our trust or identifying our trust in any beneficiary or pay-on-death designation, our trust should be identified as:

“Gregory A. Stephan and Angela C. Stephan, Trustees, or their successors in interest, of the Stephan Family Living Trust dated October 29, 2019, and any amendments thereto.”

For all purposes concerning the identity of my trust or any property titled in or payable to my trust, any description referring to my trust will be effective if it reasonably identifies my trust and indicates that the trust property is held in a fiduciary capacity.

Certificate of Qualified Retirement Plan.

Gregory A. Stephan and Angela C. Stephan, as Settlers, and Gregory A. Stephan and Angela C. Stephan, as Trustees, hereby certify to whoever it may concern, that the residuary trust beneficiaries of our trust are the beneficiaries to any and all qualified retirement plans of the settlor and that the names of those beneficiaries are as follows:

Aaron Stephan, born on May 9, 1997;
Ben Stephan, born on April 8, 2000;
Noah Stephan, born on February 27, 2007; and
Alexander Stephan, born on August 29, 1989.

ARTICLE 1

Establishing Our Trust

1.03(g). Our Permanent Residence. In order to claim homestead exemption rights under Section 196.031, Florida Statutes, during our lifetime, and during the lifetime of the survivor, we may use, possess, and occupy any real property that may be owned by the trust. Upon the death of the surviving Settlor, any beneficiary of a trust created hereunder, may use, possess, and occupy any real property owned by the beneficiary's separate subtrust.

Our interest in any real property owned by this trust, and a beneficiary's interest in any real property owned by that beneficiary's subtrust created hereunder, will be construed as “beneficial title in equity to real property” as set forth in Section 196.031(1), Florida Statutes, or any successor statute.

We, as the Settlers, or any beneficiary of a subtrust holding real property, shall be entitled to claim any available homestead tax exemption for any real property in the trust created hereunder, and for purposes of the exemption, our interest, or a beneficiary's interest, in such property shall be deemed an interest in real property and not an interest in personalty.

The provisions contained in this Section shall not restrict the Trustee in any way from selling, leasing, or encumbering such property without the Settlers' joinder in any deed or other instrument.

ARTICLE 3

Trustee Succession and Trust Advisor Provisions

3.02(b). Successor Trustee during Incapacity of a Settlor. During the incapacity of a Settlor, the other Settlor may serve as sole Trustee.

If the other Settlor is unable or unwilling to serve for any reason, then we name the following to serve as successor Trustee in this order:

Aaron Stephan then
Ben Stephan.

3.03(a). Administrative Trustee upon the Death of Gregory A. Stephan. If Gregory A. Stephan is the first of us to die, we name the following, in this order, to serve as our successor Trustee during the administration of our trust after his death, replacing any then-serving Trustee:

Angela C. Stephan;
Aaron Stephan; then
Ben Stephan.

3.03(b). Administrative Trustee upon the Death of Angela C. Stephan. If Angela C. Stephan is the first of us to die, we name the following, in this order, to serve as successor Trustee during the administration of our trust after her death, replacing any then-serving Trustee:

Gregory A. Stephan;
Aaron Stephan; then
Ben Stephan.

ARTICLE 16

Our Trustee's Powers

16.01. Introduction to Trustee's Powers. Except as otherwise specifically provided in this trust, our Trustee may exercise the powers granted by this trust without prior approval from any court, including those powers set forth under the laws of the State of Florida or any other jurisdiction whose law applies to this trust. The powers set forth in the Florida Trust Code, Chapter 736, Part VIII are specifically incorporated into this trust.

As of the date of this Certificate, the trust has not been revoked, modified, or amended in any manner that would cause the representations contained in the certification of trust to be incorrect, and the Trust Agreement remains in full force and effect.

Machine copies of this executed Certificate of Trust shall have the same force, effect and authority as the original executed Certificate of Trust.

Recording Fee: \$30.20

This Instrument Prepared by and
Please Return Recorded Document to:
The Dorcey Law Firm, PLC
Joshua O. Dorcey, Esq.
10181 Six Mile Cypress Pkwy. Ste. C
Fort Myers, Florida 33966
(File No. 5579)

NO REVIEW OR EXAMINATION OF TITLE TO THE BELOW-DESCRIBED PROPERTY HAS BEEN MADE BY JOSHUA O. DORCEY, OR THE DORCEY LAW FIRM, PLC, AND THE DESCRIPTION WAS DERIVED WITHOUT A SURVEY AND NO OPINIONS OR REPRESENTATIONS ARE BEING MADE EITHER EXPRESSLY OR IMPLIEDLY BY SUCH INDIVIDUAL OR FIRM AS TO THE ACCURACY OF SAID DESCRIPTION OR OF THE CURRENT STATUS OF TITLE.

WARRANTY DEED

THIS INDENTURE, made this 12th day of July, 2021, by and between **Gregory A. Stephan and Angela C. Stephan**, husband and wife, who resides at 2706 SW 21st Place, Cape Coral, Florida 33914, hereinafter referred to as "GRANTOR," and **Gregory A. Stephan and Angela C. Stephan**, as Trustees, or her successor(s) in interest, of the **Stephan Family Living Trust dated October 29, 2019, and any amendments thereto**, hereinafter referred to as "GRANTEE." GRANTEE'S address is 2706 SW 21st Place, Cape Coral, Florida 33914.

WITNESSETH

GRANTOR, in consideration of TEN DOLLARS (\$10.00) and other valuable consideration, does hereby grant, bargain, sell and convey to GRANTEE the following described property situated in Columbia County, Florida, to-wit:

LOT 1, SOUTHFORK, AN UNRECORDED SUBDIVISION OF A PART OF THE SOUTH 1/2 OF SECTION 10, TOWNSHIP 8 SOUTH, RANGE 16 EAST, COLUMBIA COUNTY, FLORIDA. BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHWEST CORNER OF SAID SECTION 10 AND RUN THENCE NORTH 88°52'16" EAST, ALONG THE SOUTH LINE THEREOF A DISTANCE OF 46.86 FEET TO THE POINT OF BEGINNING, SAID POINT ALSO BEING ON THE EAST RIGHT OF WAY OF STATE ROAD # 47; THENCE NORTH 88°52' 16" EAST, A DISTANCE OF 860.32 FEET; THENCE NORTH 00°23'39" WEST, A DISTANCE OF 656.81 FEET; THENCE SOUTH 88°53'29" WEST, A DISTANCE OF 659.71 FEET TO SAID EAST RIGHT OF WAY, THENCE SOUTH 00°20'30" EAST, ALONG SAID RIGHT OF WAY A DISTANCE OF 857.06 FEET TO THE POINT OF BEGINNING.

TOGETHER WITH AND SUBJECT TO AN EASEMENT FOR INGRESS AND EGRESS:
A PART OF THE SOUTH 1/2 OF SECTION 10, TOWNSHIP 8 SOUTH, RANGE 16 EAST, COLUMBIA COUNTY, FLORIDA. BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHWEST CORNER OF SAID SECTION 10 AND RUN THENCE NORTH 88 DEGREES 52'16" EAST, ALONG THE SOUTH LINE OF SAID SECTION 10, A DISTANCE OF 46.86 FEET TO THE EAST RIGHT OF WAY OF STATE ROAD NO. 47; THENCE NORTH 00 DEGREES 20'30" WEST ALONG SAID EAST RIGHT OF WAY 827.05 FEET TO THE POINT OF BEGINNING; THENCE NORTH 00 DEGREES 02'30" WEST, STILL ALONG SAID RIGHT OF WAY A DISTANCE OF 80.00 FEET; THENCE NORTH 88 DEGREES 53'29" EAST, A DISTANCE OF 629.07 FEET; THENCE NORTH 00 DEGREES 24'41" WEST A DISTANCE OF 681.80 FEET; THENCE NORTH 88 DEGREES 53'28" EAST, A DISTANCE OF 60.00 FEET; THENCE SOUTH 00 DEGREES 24'41" EAST, A DISTANCE OF 681.80 FEET; THENCE NORTH 88 DEGREES 53'29" EAST, A DISTANCE OF 629.35 FEET; THENCE NORTH 88 DEGREES 58' 12" EAST, 650.99 FEET, THENCE NORTH 01 DEGREES 01'48" WEST, A DISTANCE OF 589.75 FEET; THENCE SOUTH 87 DEGREES 47'54" WEST A DISTANCE OF 36.83 FEET; THENCE NORTH 00 DEGREES 25'25" WEST A DISTANCE OF 739.88 FEET; THENCE NORTH 88 DEGREES 25'30" EAST, A DISTANCE OF 80.01 FEET; THENCE SOUTH 00 DEGREES 25'25" EAST A DISTANCE OF 679.29 FEET; THENCE NORTH 87 DEGREES 47'54" EAST, A DISTANCE OF 36.18 FEET; THENCE SOUTH 01 DEGREES 01'48" EAST, A DISTANCE OF 650.01 FEET; THENCE NORTH 88 DEGREES 37'18" EAST, A DISTANCE OF 2903.18 FEET; THENCE SOUTH 00 DEGREES 17'09" EAST, A DISTANCE OF 80.01 FEET; THENCE SOUTH 88 DEGREES 37'18" WEST, A DISTANCE OF 2832.46 FEET; THENCE SOUTH 88 DEGREES 58'12" WEST, 681.08 FEET; THENCE SOUTH 88 DEGREES 53'28" WEST, 1318.83 FEET TO THE POINT OF BEGINNING, COLUMBIA COUNTY, FLORIDA.

Property Appraiser's Parcel Identification Number: R03814-101

Subject to restrictions, reservations and easements of record, if any, and taxes for the current and subsequent years.

Further, full power and authority are conferred upon Grantee, as trustee, to protect, conserve, sell, convey, lease, grant and encumber all interests conveyed by this instrument, and otherwise to manage and dispose of those interests, it being the intent of Grantor to vest in the trustee of the Trust full rights of ownership as authorized by Section 689.073 of the Florida Statutes (2016).

AND GRANTOR hereby covenants that Grantor is lawfully seized of said property in fee simple and it is free of encumbrances except as above-stated; that Grantor has good right and lawful authority to convey same and Trustee shall have quiet enjoyment thereof; that Grantor will make such other and further assurances to perfect the fee simple title to said property as may hereafter be required.

TOGETHER WITH all appurtenances, privileges, rights, interests, reversions, remainders and easements thereunto appertaining.

TO HAVE AND TO HOLD said real estate with the following powers and for the following uses and purposes, to-wit:

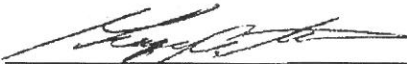
AND GRANTOR does hereby fully warrant the title of said property, and will defend the same against lawful claims of all persons whomsoever.

The terms "Grantor" and "Grantee" shall be non-gender specific masculine or feminine, singular or plural, as the context permits or requires, and include heirs, personal representatives, successors or assigns where applicable and permitted.

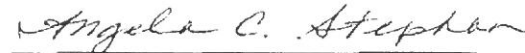
Notice to Clerk and Department of Revenue: This deed is given for minimum consideration to/from a beneficiary of a revocable living trust and is subject to minimum documentary stamp tax pursuant to Section 12B-4.014(28)(i).

IN WITNESS WHEREOF, said Grantor has hereunto set Grantor's hand and seal the day and year first above written.

Signed, Sealed and Delivered in our presence:




Gregory A. Stephan



Angela C. Stephan

Signed in the presence of:



Witness #1 Signature

Yen-Po Chiu

Witness #1 Printed Name



Witness #2 Signature

Kristen Aleo

Witness #2 Printed Name

STATE OF FLORIDA }
COUNTY OF LEE }

The foregoing instrument was acknowledged before me by means of physical presence or online
notarization this 12th day of July, 2021, by Gregory A. Stephan and Angela C. Stephan,
who are personally known to me or have produced _____ and
_____ as identification.

Wendy S Gallagher
Notary Public Signature



Recording Fee: \$30.20

This Instrument Prepared by and
Please Return Recorded Document to:
The Dorcey Law Firm, PLC
Joshua O. Dorcey, Esq.
10181 Six Mile Cypress Pkwy, Ste. C
Fort Myers, Florida 33966
(File No. 5579)

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WARRANTY DEED

THIS INDENTURE, made this 12TH day of JULY 2021, by and between **Gregory A. Stephan and Angela C. Stephan**, husband and wife, who resides at 2706 SW 21st Place, Cape Coral, Florida 33914, hereinafter referred to as "GRANTOR," and **Gregory A. Stephan and Angela C. Stephan, as Trustees, or her successor(s) in interest, of the Stephan Family Living Trust dated October 29, 2019, and any amendments thereto**, hereinafter referred to as "GRANTEE." GRANTEE's address is 2706 SW 21st Place, Cape Coral, Florida 33914.

WITNESSETH

GRANTOR, in consideration of TEN DOLLARS (\$10.00) and other valuable consideration, does hereby grant, bargain, sell and convey to GRANTEE the following described property situated in Columbia County, Florida, to-wit:

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Property Appraiser's Parcel Identification Number: R03814-101

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Further, full power and authority are conferred upon Grantee, as trustee, to protect, conserve, sell, convey, lease, grant and encumber all interests conveyed by this instrument, and otherwise to manage and dispose of those interests, it being the intent of Grantor to vest in the trustee of the Trust full rights of ownership as authorized by Section 689.073 of the Florida Statutes (2016).

AND GRANTOR hereby covenants that Grantor is lawfully seized of said property in fee simple and it is free of encumbrances except as above-stated; that Grantor has good right and lawful authority to convey same and Trustee shall have quiet enjoyment thereof; that Grantor will make such other and further assurances to perfect the fee simple title to said property as may hereafter be required.

TOGETHER WITH all appurtenances, privileges, rights, interests, reversions, remainders and easements thereunto appertaining.

TO HAVE AND TO HOLD said real estate with the following powers and for the following uses and purposes, to-wit:

AND GRANTOR does hereby fully warrant the title of said property, and will defend the same against lawful claims of all persons whomsoever.

The terms "Grantor" and "Grantee" shall be non-gender specific masculine or feminine, singular or plural, as the context permits or requires, and include heirs, personal representatives, successors or assigns where applicable and permitted.

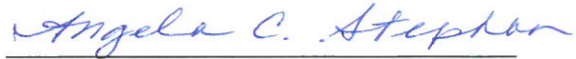
Notice to Clerk and Department of Revenue: This deed is given for minimum consideration to/from a beneficiary of a revocable living trust and is subject to minimum documentary stamp tax pursuant to Section 12B-4.014(28)(i).

IN WITNESS WHEREOF, said Grantor has hereunto set Grantor's hand and seal the day and year first above written.

Signed, Sealed and Delivered in our presence:



Gregory A. Stephan



Angela C. Stephan

Signed in the presence of:



Witness #1 Signature

Yen-Po Chiu

Witness #1 Printed Name



Witness #2 Signature

Kristen Aleo

Witness #2 Printed Name

STATE OF FLORIDA }
COUNTY OF LEE }

The foregoing instrument was acknowledged before me by means of physical presence or online notarization this 12th day of July, 2021, by Gregory A. Stephan and Angela C. Stephan, who are personally known to me or have produced _____ and _____ as identification.

Wendy S Gallagher
Notary Public Signature



JOSHUA O. DORCEY, Esq.*
MANAGING PARTNER

MICHAEL A. SCOTT, ESQ.
JUNIOR PARTNER
ERICA D. JOHNSON, ESQ.
JUNIOR PARTNER
KARA A. SAJDAK, ESQ.
JUNIOR PARTNER
BRIAN H. BRONSTHER, ESQ.**
SENIOR COUNSEL
JOHN CASEY STEWART, ESQ.
MORRIS E. OSBORN, ESQ., LL.M.
OF COUNSEL
K.C. WILLIAMS, ESQ.
OF COUNSEL
CHRISTOPHER Q. WINTTER, ESQ.
OF COUNSEL

**also admitted in Alabama **also admitted in New York*



10181 Six Mile Cypress Pkwy - Suite C
Fort Myers, Florida 33966
239-418-0169 Phone
239-418-0048 Fax

www.DorceyLaw.com

ELECTRONIC MAIL:

JOSH@DORCEYLAW.COM
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CASEY@DORCEYLAW.COM
MORRIS@DORCEYLAW.COM
KC@DORCEYLAW.COM
CHRISTOPHER@DORCEYLAW.COM

Mr. and Mrs. Stephan
2706 SW 21st Place
Cape Coral, FL 33914

Re: **Warranty Deed**

Dear Mr. and Mrs. Stephan:

Enclosed please find the following **Warranty Deed**, which was recorded in the Official Records of Columbia County, Florida:

You may receive correspondence from the county pertaining to this deed, or requesting an updated Homestead Application (if applicable). Please fill out and return the Homestead application, and note that this transfer deed does not affect your homestead status at all – it is merely a formality.

If you receive correspondence from anyone other than our office requesting any payment, do not pay this as our firm has covered all applicable costs on your behalf.

Please place the recorded documents in a safe place. Our recommendation is placing these documents in section 5 of your Estate Planning binder.

Should you have any questions at all, please do not hesitate to contact our office. Thank you for allowing my firm to assist you with your Estate Planning needs.

Sincerely,

*Joshua O. Dorcey**

JOSHUA O. DORCEY
Enclosures

Signed electronically to expedite processing