


Send tax notice to:  
Allison Morrow Stephens and  
Gerard J. Kassouf, as Trustees  
1115 Indian Crest Drive  
Indian Springs, AL 35124

This instrument prepared by:  
Charles A. J. Beavers, Jr.  
Beavers Law, LLC  
4301 Dolly Ridge Road  
Birmingham, Alabama 35243

STATE OF ALABAMA     )  
                                  :  
SHELBY COUNTY         )

  
20200526000209170 1/9 \$54.00  
Shelby Cnty Judge of Probate, AL  
05/26/2020 03:03:00 PM FILED/CERT

**STATUTORY WARRANTY DEED**  
**(Dennis Tract)**

**KNOW ALL MEN BY THESE PRESENTS:**

That pursuant to the provisions of the Will of Michael E. Stephens, Deceased, as more particularly identified hereinbelow, Ten Dollars (\$10.00), and other good and valuable considerations, in hand paid to **ALLISON MORROW STEPHENS**, as Personal Representative of the Estate of Michael E. Stephens, Deceased, Circuit Court for Collier County, Florida, Probate Division File No. 2017-CP-1610, whose Will dated January 20, 2012 was filed for Ancillary Probate in Shelby County, Alabama, Probate Case No. PR-2017-000541; **ALLISON MORROW STEPHENS**, as a Trustee of the Michael E. Stephens Revocable Trust, as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012; **GERARD J. KASSOUF**, as a Trustee of the Michael E. Stephens Revocable Trust, as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012; and **ALLISON MORROW STEPHENS**, an unmarried woman ("Grantors"), by **ALLISON MORROW STEPHENS** and **GERARD J. KASSOUF**, as Trustees of the Reverse QTIP Trust, as governed by Article IX of that certain First Amended and Restated Trust Agreement dated January 20, 2012 ("Grantees"), the receipt and sufficiency of which are hereby acknowledged, Grantors do hereby grant, bargain, sell, and convey unto Grantees, subject to the matters hereinafter set forth, the real property (the "Property") situated in Shelby County, Alabama, and described on *Exhibit A* attached hereto.

**TO HAVE AND TO HOLD** the Property unto Grantees, their successors and assigns forever, subject, however, to the matters shown on *Exhibit B* attached hereto.

24<sup>th</sup> IN WITNESS WHEREOF, Grantors have hereunto set their hands and seals as of this day of April, 2020.

Allison Morrow Stephens

Allison Morrow Stephens, as Personal Representative  
of the Estate of Michael E. Stephens, Deceased,  
Circuit Court for Collier County, Florida,  
Probate Division File No. 2017-CP-1610,  
whose Will dated January 20, 2012 was filed for  
Ancillary Probate in Shelby County, Alabama,  
Probate Case No. PR-2017-000541

STATE OF ALABAMA     )  
                                     :  
JEFFERSON COUNTY     )

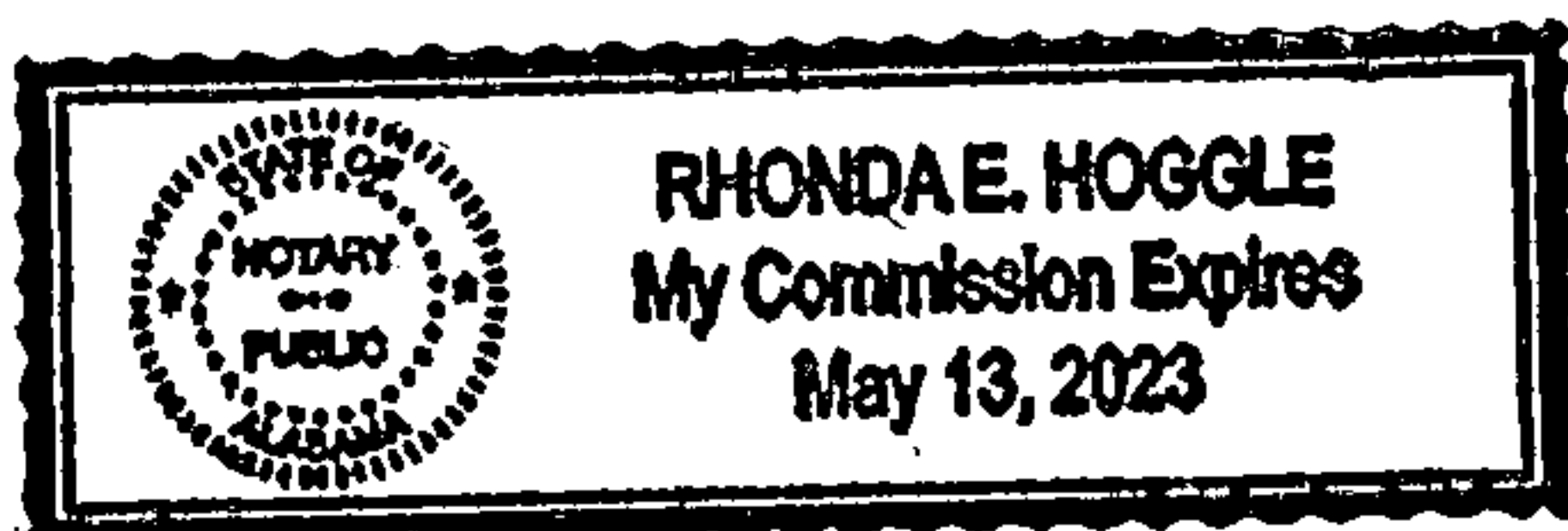
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name as Personal Representative of the Estate of Michael E. Stephens, Deceased, Circuit Court for Collier County, Florida, Probate Division File No. 2017-CP-1610, whose Will dated January 20, 2012 was filed for Ancillary Probate in Shelby County, Alabama, Probate Case No. PR-2017-000541, is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day that, being informed of the contents of said instrument, she, in her capacity as such Personal Representative, executed the same voluntarily on the day the same bears date.

Given under my hand and official seal this 24<sup>th</sup> day of April, 2020.

Rhonda E. Hoggle  
Notary Public

[NOTARIAL SEAL]

My commission expires: 5/13/23



Allison Morrow Stephens  
Allison Morrow Stephens, as a Trustee of the  
Michael E. Stephens Revocable Trust, as amended by  
that certain First Amended and Restated Trust  
Agreement dated January 20, 2012, and as a Trustee of  
the Reverse QTIP Trust and the Marital Trust, each  
governed by Article IX of such Amended and Restated  
Trust Agreement dated January 20, 2012

STATE OF ALABAMA     )  
                                      :  
JEFFERSON COUNTY     )

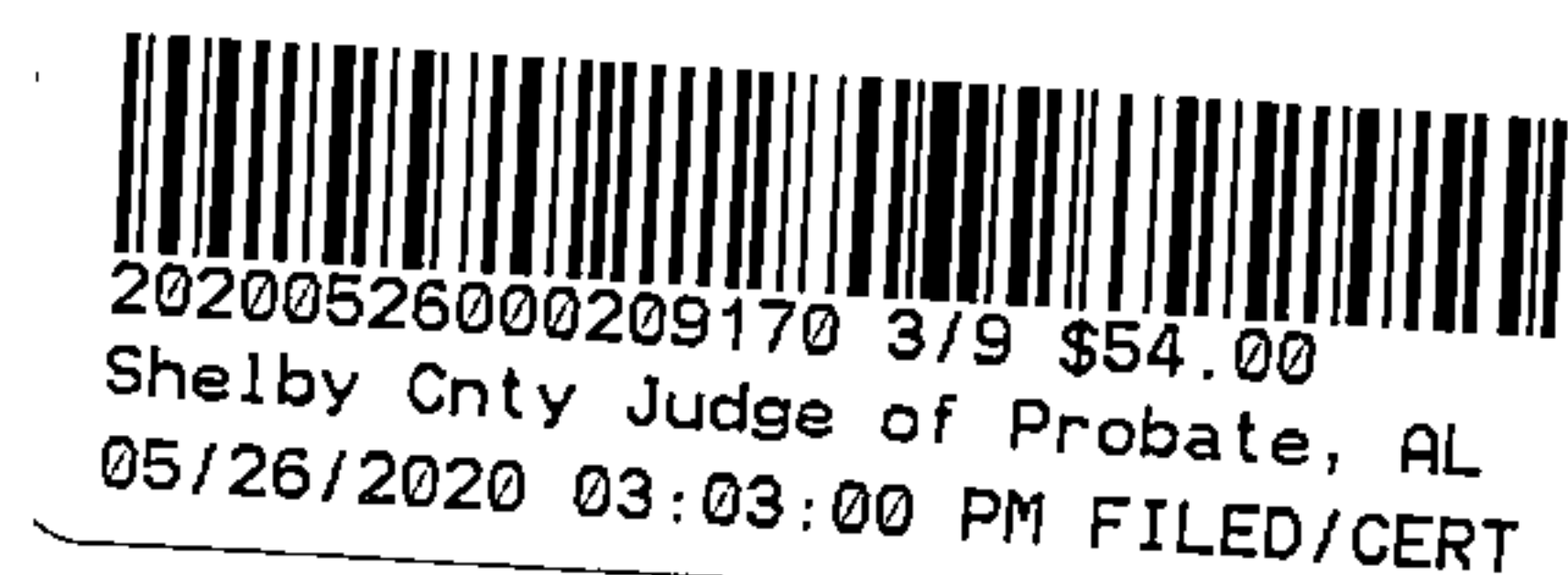
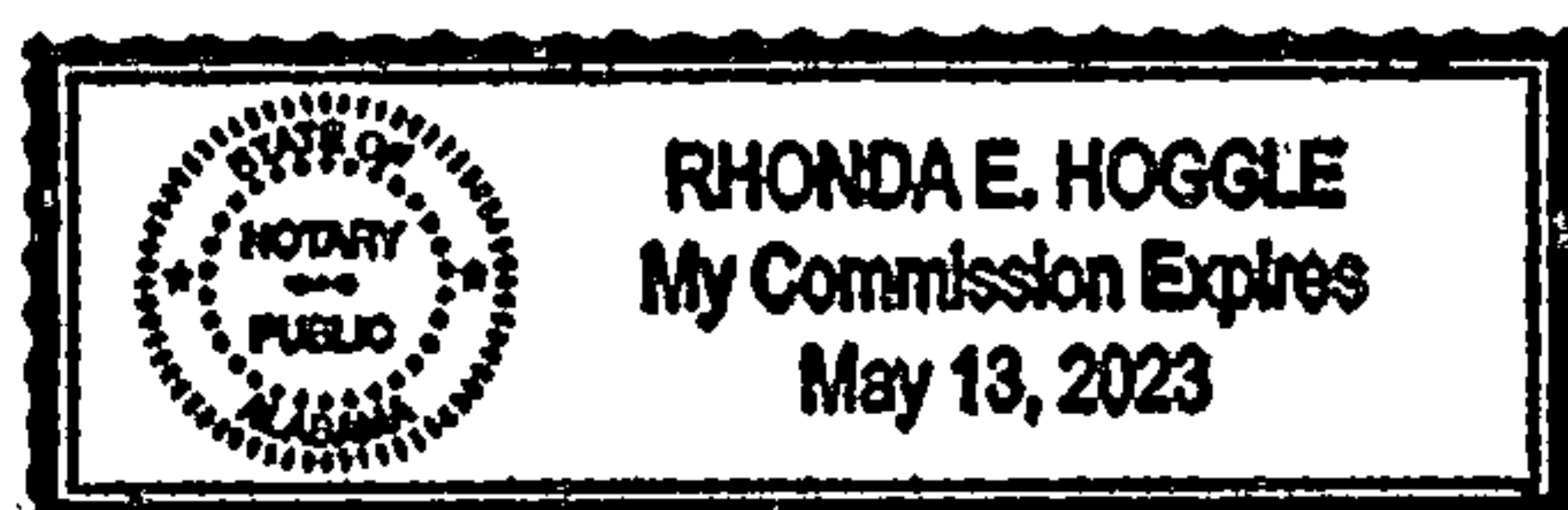
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name as a Trustee of Michael E. Stephens Revocable Trust as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012, is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day that, being informed of the contents of said instrument, she, in such capacities, executed the same voluntarily on the day the same bears date.

Given under my hand and official seal this 24<sup>th</sup> day of April, 2020.

Rhonda E. Hoggle  
Notary Public

[NOTARIAL SEAL]

My commission expires: 5/13/23





Gerard J. Kassouf

Gerard J. Kassouf, as a Trustee of the  
Michael E. Stephens Revocable Trust, as amended by  
that certain First Amended and Restated Trust  
Agreement dated January 20, 2012, and as a Trustee of  
the Reverse QTIP Trust and the Marital Trust, each  
governed by Article IX of such Amended and Restated  
Trust Agreement dated January 20, 2012

STATE OF ALABAMA     )  
                                  :  
JEFFERSON COUNTY    )

I, the undersigned, a notary public in and for said county in said state, hereby certify that Gerard J. Kassouf, whose name as a Trustee of Michael E. Stephens Revocable Trust as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012, is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day that, being informed of the contents of said instrument, he, in such capacities, executed the same voluntarily on the day the same bears date.

Given under my hand and official seal this 22<sup>nd</sup> day of April, 2020.

Ellen A. Tipton

Notary Public

[NOTARIAL SEAL]

My commission expires: 5-15-2023

ELLEN A TIPTON  
NOTARY PUBLIC, ALABAMA STATE AT LARGE  
MY COMMISSION EXPIRES MAY. 15, 2023

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Shelby Cnty Judge of Probate, AL  
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Allison Morrow Stephens  
Allison Morrow Stephens

STATE OF ALABAMA     )  
                                  :  
JEFFERSON COUNTY     )

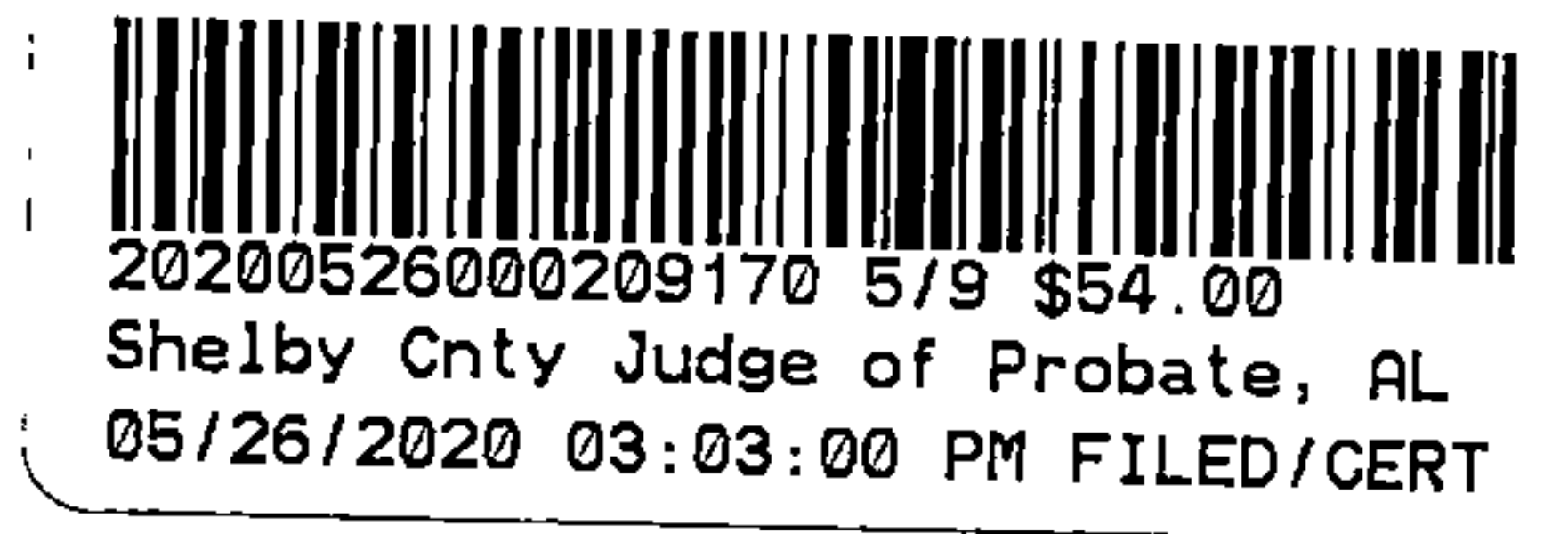
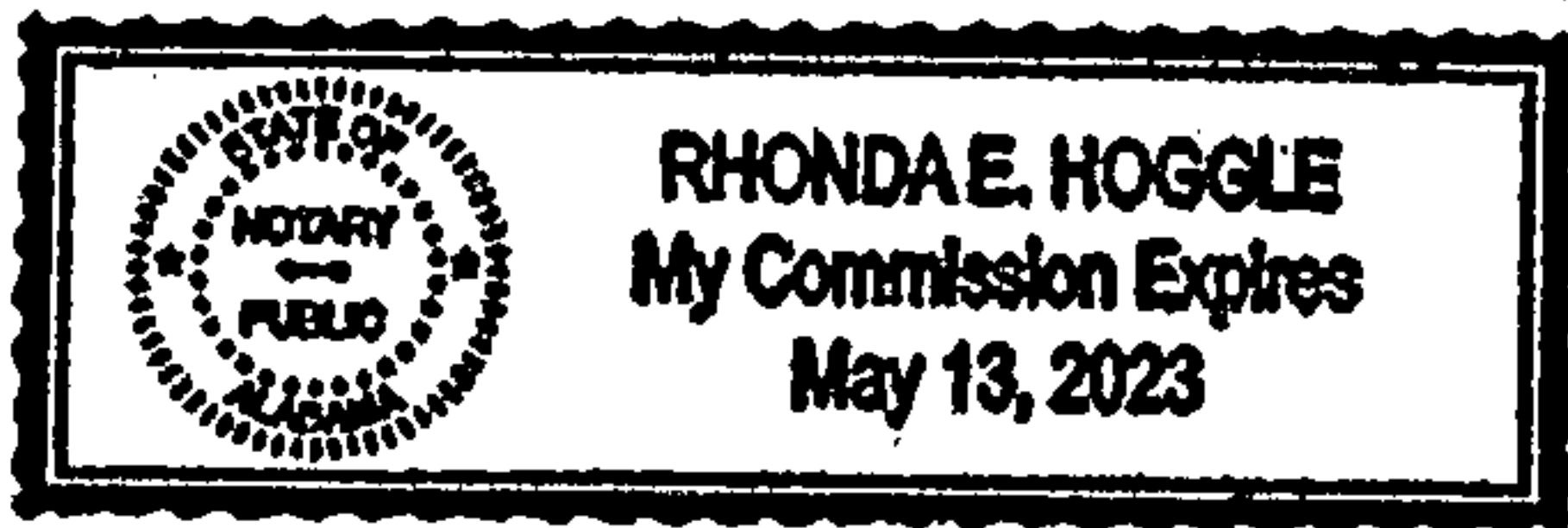
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day that, being informed of the contents of said instrument, she executed the same voluntarily on the day the same bears date.

Given under my hand and official seal this 24<sup>th</sup> day of April, 2020.

Rhonda E. Hogg  
Notary Public

[NOTARIAL SEAL]

My commission expires: 5/13/23



## **EXHIBIT A**

### **Dennis Tract**

A parcel of land in the east half of the northeast quarter of Section 28, Township 19 South, Range 2 West, Shelby County, Alabama, being more particularly described as follows:

From the northeast corner of Section 28, Township 19 South, Range 2 West, run southerly along the east boundary line of said section 975.61 feet, more or less, to a point on the south right-of-way line of Cahaba Valley Road; thence turn an angle of 69 degrees 51 minutes to the right and run southwesterly along the south right-of-way line of said Cahaba Valley Road 267.28 feet to the point of beginning of the land herein described; thence continue southwesterly along the south right-of-way line of said road 286.72 feet; thence turn 87 degrees 54 minutes to the left and run southeasterly 389.8 feet; thence turn 102 degrees 24 minutes to the left and run northeasterly 108.15 feet; thence turn 38 degrees to the right and run southeasterly 55.64 feet; thence turn 97 degrees 33 minutes to the left and run northerly 421.89 feet to the point of beginning. This parcel of land being a part of the east half of the northeast quarter of Section 28, Township 19 South, Range 2 West, and includes all the land that lies between the south boundary lines of the above described land and the center of Bishop Creek; being situated in Shelby County, Alabama.



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**EXHIBIT B**

1. Taxes and assessments for the year 2020 and subsequent years, not yet due and payable.
2. Any mineral and/or mining rights not owned by Grantors.
3. Easements, restrictions, covenants, declarations, limitations, reservations, and rights of way of record.
4. Matters that would be disclosed by an accurate survey or inspection of the Property.
5. Riparian rights incident to the premises.
6. Transmission line permit(s) to Alabama Power Company as shown by instrument(s) recorded in Deed 101, page 529; Deed 186, page 178; and Deed 141, page 172.
7. Right(s)-of-way granted to Shelby County by instrument(s) recorded in Deed 135, page 19.
8. That certain Utilities Easement as described in Declaration of Utility Easement recorded as Instrument No. 20191226000476450 in the Office of the Judge of Probate of Shelby County, Alabama.
9. That certain 75 Foot No Disturb Buffer Easement as described in Declaration of Easements recorded as Instrument No. 20200207000052650 in the Office of the Judge of Probate of Shelby County, Alabama.



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# Real Estate Sales Validation Form

*This Document must be filed in accordance with Code of Alabama 1975, Section 40-22-1*

Grantor's Name See Attachment  
Mailing Address 1115 Indian Crest Drive  
Indian Springs, AL 35124

Grantee's Name See Attachment  
Mailing Address 1115 Indian Crest Drive  
Indian Springs, AL 35124

Property Address 2.26 Acres on Cahaba Valley Road  
Indian Springs, AL 35124  
(Dennis Tract)

Date of Sale April 24, 2020

Total Purchase Price \$

or

Actual Value

\$

or

Assessor's Market Value \$ 122,160.00

The purchase price or actual value claimed on this form can be verified in the following documentary evidence: (check one) (Recordation of documentary evidence is not required)

☐ Bill of Sale  
☐ Sales Contract  
☐ Closing Statement

☐ Appraisal  
☒ Other No recording tax due - conveyance is made  
pursuant to Will of Michael E. Stephens

If the conveyance document presented for recordation contains all of the required information referenced above, the filing of this form is not required.

## Instructions

Grantor's name and mailing address - provide the name of the person or persons conveying interest to property and their current mailing address.

Grantee's name and mailing address - provide the name of the person or persons to whom interest to property is being conveyed.

Property address - the physical address of the property being conveyed, if available.

Date of Sale - the date on which interest to the property was conveyed.

Total purchase price - the total amount paid for the purchase of the property, both real and personal, being conveyed by the instrument offered for record.

Actual value - if the property is not being sold, the true value of the property, both real and personal, being conveyed by the instrument offered for record. This may be evidenced by an appraisal conducted by a licensed appraiser or the assessor's current market value.

If no proof is provided and the value must be determined, the current estimate of fair market value, excluding current use valuation, of the property as determined by the local official charged with the responsibility of valuing property for property tax purposes will be used and the taxpayer will be penalized pursuant to Code of Alabama 1975 § 40-22-1 (h).

I attest, to the best of my knowledge and belief that the information contained in this document is true and accurate. I further understand that any false statements claimed on this form may result in the imposition of the penalty indicated in Code of Alabama 1975 § 40-22-1 (h).

Date May 14, 2020

Print Charles A. J. Beavers, Jr.

Sign

(Grantor/Grantee/Owner/Agent) circle one

Form RT-1



20200526000209170 8/9 \$54.00  
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05/26/2020 03:03:00 PM FILED/CERT

verified by)



**ATTACHMENT TO REAL ESTATE SALES VALIDATION FORM**

**GRANTORS:**

**ALLISON MORROW STEPHENS**, as Personal Representative of the Estate of Michael E. Stephens, Deceased, Circuit Court for Collier County, Florida, Probate Division File No. 2017-CP-1610, whose Will dated January 20, 2012 was filed for Ancillary Probate in Shelby County, Alabama, Probate Case No. PR-2017-000541


**ALLISON MORROW STEPHENS**, as a Trustee of the Michael E. Stephens Revocable Trust, as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012

**GERARD J. KASSOUF**, as a Trustee of the Michael E. Stephens Revocable Trust, as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse QTIP Trust and the Marital Trust, each governed by Article IX of such Amended and Restated Trust Agreement dated January 20, 2012

**ALLISON MORROW STEPHENS**, an unmarried woman

**GRANTEES:**

**ALLISON MORROW STEPHENS** and **GERARD J. KASSOUF**, as Trustees of the Reverse QTIP Trust, as governed by Article IX of that certain First Amended and Restated Trust Agreement dated January 20, 2012

  
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