


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         )

  
20200526000209180 1/9 \$54.00  
Shelby Cnty Judge of Probate, AL  
05/26/2020 03:03:01 PM FILED/CERT

**STATUTORY WARRANTY DEED**  
**(Bishop 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     )

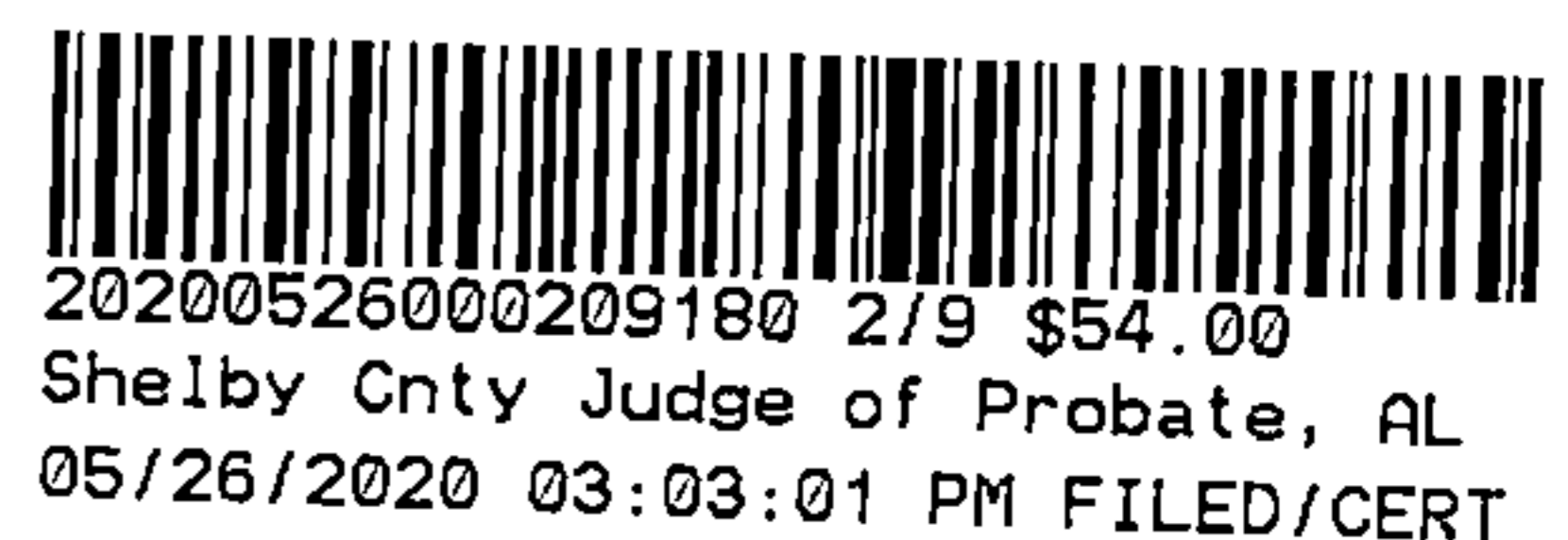
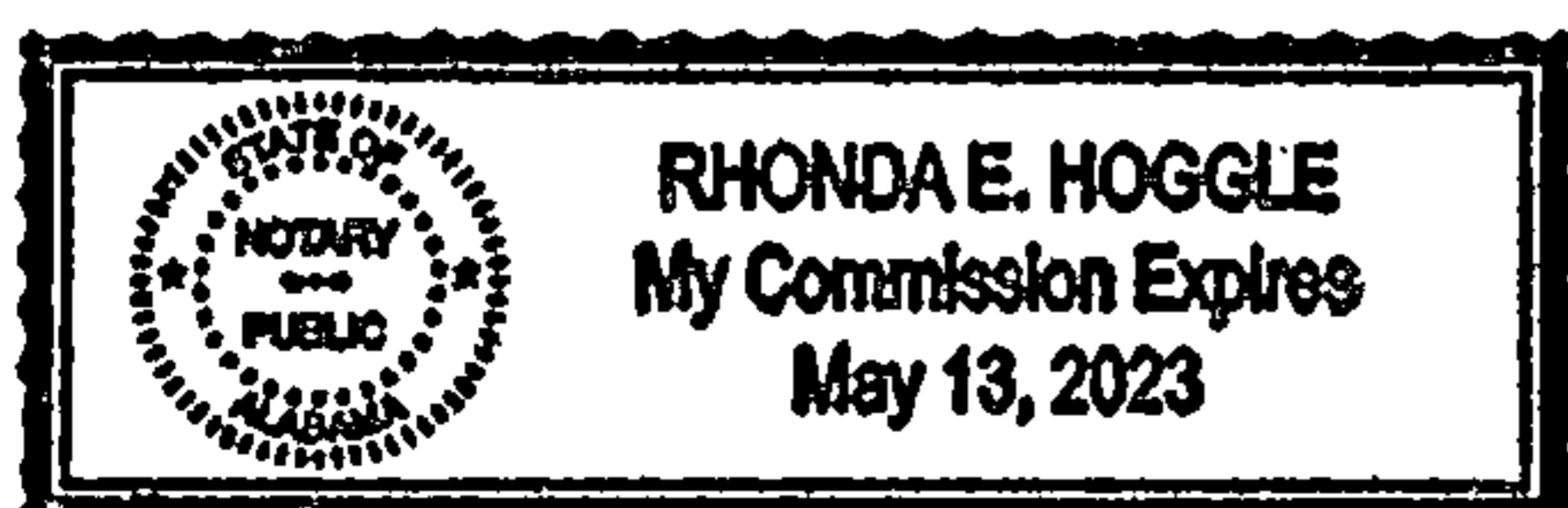
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name as Personal Representative of the Estate of Michael E. Stephens, Deceased, Circuit Court for Collier County, Florida, Probate Division File No. 2017-CP-1610, whose Will dated 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    )

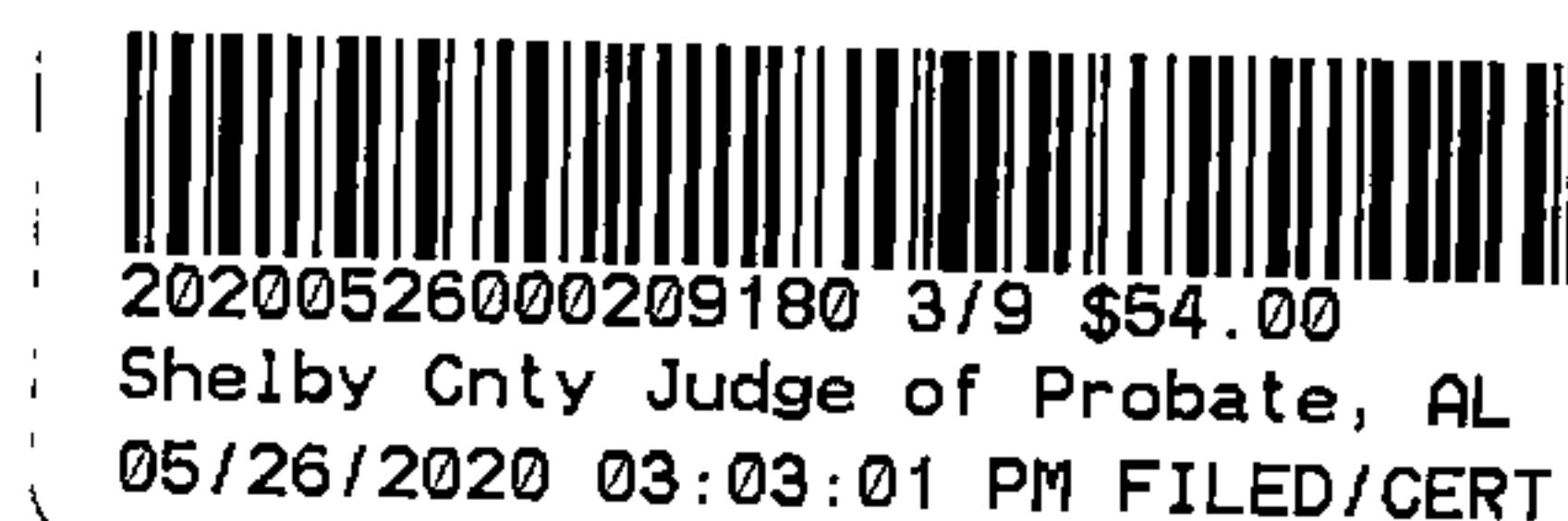
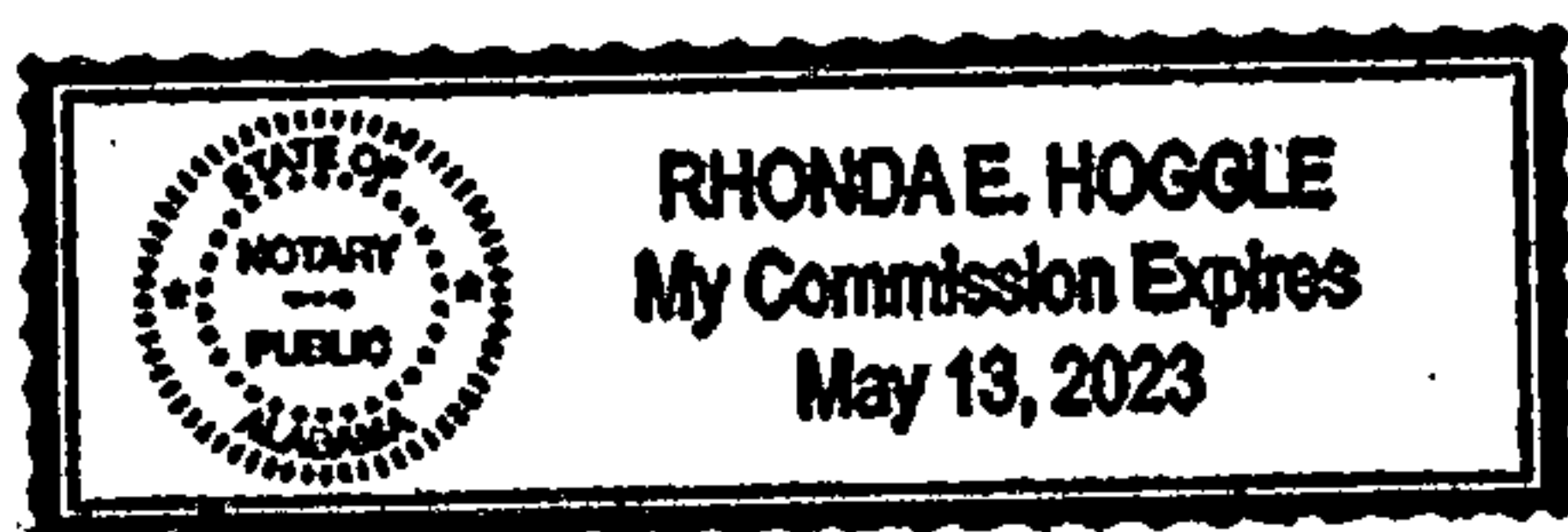
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name as a Trustee of Michael E. Stephens Revocable Trust as amended by that certain First Amended and Restated Trust Agreement dated January 20, 2012, and as a Trustee of the Reverse 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     )

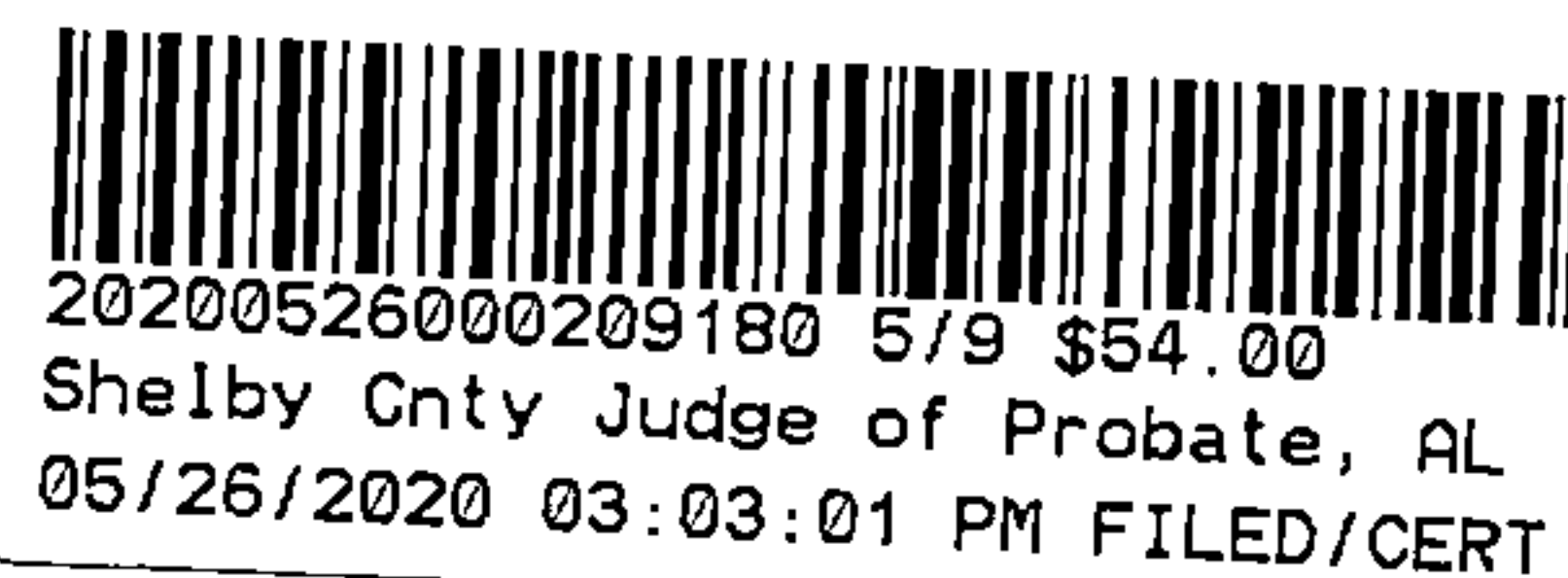
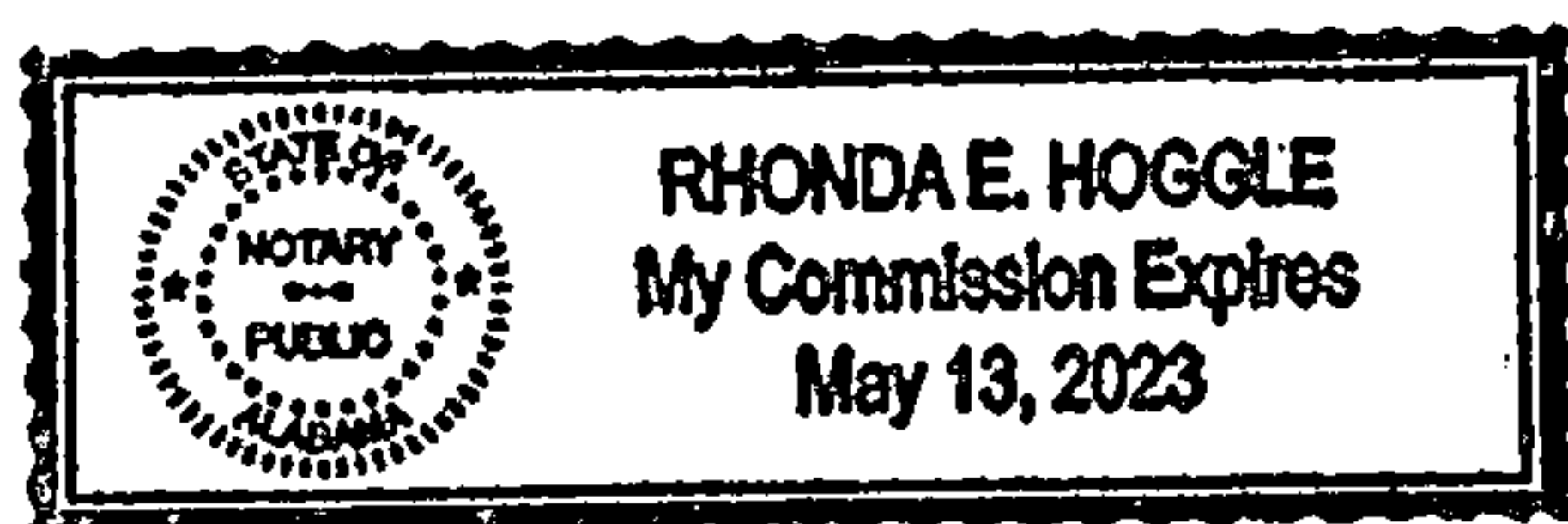
I, the undersigned, a notary public in and for said county in said state, hereby certify that Allison Morrow Stephens, whose name is signed to the foregoing instrument, and who is known to me, acknowledged before me on this day that, being informed of the contents of said instrument, she executed the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

### **Bishop Tract**

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

Commence at the northeast corner of the northeast quarter of Section 28; thence run in a southerly direction along the east line of said quarter a distance of 975.47 feet to a ½" open-top iron found on the southeast right-of-way of Alabama Highway #119, said point being the point of beginning of the parcel herein described; thence continue in a southerly direction along the last described course a distance of 460.00 feet to a point in the center of Bishop Creek; thence following the meander of the centerline of said creek 300 feet more or less to a point in the centerline of said creek which lies on a tie line forming an interior angle of 110 deg. 07 min. 00 sec. at a distance of 246.00 feet from the last course and point; thence from said line turn an interior angle of 70 deg. 03 min. 56 sec. and leaving said creek run in a northerly direction a distance of 460.69 feet to an RCF rebar & cap found on the southeasterly right-of-way of said Highway #119; thence turn an interior angle of 109 deg. 40 min. 10 sec. and run to the right in a northeasterly direction along said right-of-way a distance of 247.14 feet to the point of beginning.



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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 permits to Alabama Power Company as shown by instruments recorded in Deed Book 101, page 529, and Deed Book 112, page 510.
7. 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.
8. That certain 75 Foot No Disturb Buffer Easement and that certain Bishop Tract Access 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 2.51 Acres on Cahaba Valley Road  
Indian Springs, AL 35124  
(Bishop Tract)

Date of Sale April 24, 2020

Total Purchase Price \$                     

or

Actual Value \$                     

or

Assessor's Market Value \$ 136,030.00

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.

                     Unattested                     

Sign 

(~~Grantor~~/~~Grantee~~/~~Owner~~/~~Agent~~) circle one

  
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Shelby Cnty Judge of Probate, AL  
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erified by)

Form RT-1

**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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