

FILED

IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA

2009 DEC -4 AM 8:55

IN THE MATTER OF THE ESTATE OF)

No. PR08-176

DOUGLAS COUNTY, NEBRASKA

MAKILYN L. CLAPPER
COUNTY COURT CLERK

AMENDED INVENTORY

HELEN D. BARTOSH, Deceased

The undersigned Personal Representative hereby certifies that the schedules attached hereto are a true and complete inventory of the property owned by the Decedent at the time of death together with the type and amount of any encumbrance existing with reference to any item. Attached hereto are the following schedules:

| | Total Value at Date of Death 5-5-08 |
|--|---|
| (X) Schedule A - Real Estate (located in the State of Nebraska) | \$1,024,459.00 |
| (X) Schedule B - Stocks and Bonds | \$114,358.00 |
| (X) Schedule C - Mortgages, Notes and Cash | \$386,896.00 |
| (X) Schedule F - Other Miscellaneous Property | \$5,200.00 |
| TOTAL | \$1,530,913.00 |

Estate of Helen D. Bartosh, Deceased,

By Joseph C Costa
Joseph C. Costa



*Non-Probate Property subject to Nebraska Inheritance Tax.

SCHEDULE A
REAL ESTATE

Personal Residence – 2428 Estes Lane\$224,459.00
Lot 4, Block 1, Lynden Acres Third Addition, an addition to the
City of Fremont, as surveyed, platted and recorded in Dodge
County, Nebraska

Farmland\$800,000.00
The Northwest Quarter of the Northwest Quarter (NW¹/₄ NW¹/₄),
Section 16, Township 20, Range 5 East of the 6th P.M., Dodge
County, Nebraska;

From the Southwest corner of Section 9, Township 20 North, Range
5 East; thence North along the West line of said Section 9 a distance
of 1330.16 feet to the Northwest corner of the South Half of the
Southwest Quarter of said section; thence N89°53'08"E on the North
line of said South Half of the Southwest Quarter a distance of 861.66
feet to the point of beginning; thence S0°06'52"E a distance of
518.21 feet; thence N89°53'08"E a distance of 752.75 feet; thence
S2°47'03"W a distance of 813.43 feet to a point on the South line of
Section 9; thence East along said South line to the Southeast corner
of the South Half of the Southwest Quarter; thence North along the
East line of said South Half of the Southwest Quarter to the Northeast
corner of the South Half of the Southwest Quarter; thence West along
the North line of the South Half of the Southwest Quarter to the point
of beginning; lying in the South Half of the Southwest Quarter of
Section 9, Township 20 North, Range 5 East of the 6th P.M., Dodge
County, Nebraska; NOTE: Legal description of Tax lot 4 taken from
the Tax Lot Descriptions of the Dodge County Assessor;

The Southeast Quarter of the Northwest Quarter (SE¹/₄ NW¹/₄), the
South Half of the Southwest Quarter of the Northwest Quarter (S¹/₂
SW¹/₄ NW¹/₄), Section 9, Township 20, Range 5 East of the 6th P.M.,
Dodge County, Nebraska;

TOTAL**\$1,024,459.00**

**SCHEDULE B
STOCKS AND BONDS**

| | |
|-------------------------------|--------------------------|
| Edward D. Jones - Mutual Fund |\$114,358.00 |
| TOTAL |\$114,358.00 |

**SCHEDULE C
MORTGAGES, NOTES AND CASH**

| | |
|-------------------------------|--------------------------|
| First National Bank Northeast |\$12,254.00 |
| Lincoln Federal Bank |\$39,000.00 |
| First State Bank |\$65,000.00 |
| Fremont National Bank |\$209,691.00 |
| Farmers State Bank |\$60,951.00 |
| | |
| TOTAL |\$386,896.00 |

**SCHEDULE F
OTHER MISCELLANEOUS PROPERTY**

2000 Buick LeSabre\$5,200.00

TOTAL**\$5,200.00**

FILED

IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA

2009 DEC -4 AM 8:55

IN THE MATTER OF THE ESTATE OF)

No. PR 08-176

DODGE COUNTY, NEBRASKA
MARILYN L. CLAPPER
COUNTY COURT CLERK

AMENDED

HELEN D. BARTOSH, Deceased)

ORDER DETERMINING AND
ASSESSING INHERITANCE TAX

Upon consideration of the evidence and the Petition for Determination of Inheritance Tax and all supporting documents, if any, filed herein and incorporated by reference.

The Court Finds, Orders, and Determines that:

1. Notice has been given to or duly waived by all persons interested in the estate or property of the Decedent.

2. The County Attorney for each county in which the property described in the Petition is located, has executed and filed with this Court a Waiver of Notice upon him to show cause, or of time and place of hearing, and has entered a Voluntary Appearance in behalf of the County and State of Nebraska.

3. The values set forth in the Petition for Determination of Inheritance Tax, the Inheritance Tax Worksheet, and all supporting documents, if any, filed herein duly and accurately reflect the total clear market value of the assets listed therein subject to Nebraska inheritance tax; and that all deductions, credits, allowances, exemptions, fees and costs, and contributions by survivors to jointly-owned property claimed therein, if any, are proper and are hereby allowed.

4. Inheritance tax is hereby assessed against the following-named parties in the amounts specified, to wit:

| <u>Beneficiary</u> | <u>Tax Due</u> |
|--------------------|--------------------|
| Joseph Costa | \$121,581.61 |
| John Costa | \$21,019.43 |
| Barb Francis | \$21,019.43 |
| Karen Costa | <u>\$21,019.43</u> |
| Total | \$184,649.90 |

and that said tax is apportioned to the following counties:

Dodge County \$184,639.90

A previous Order Determining and Assessing Inheritance Tax in this matter was entered by



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this Court on October 21, 2008, and inheritance tax in the amount of \$189,382.45 was paid. This Amended Order correctly sets forth the amount of inheritance tax due in the sum of \$184,639.90. Therefore, a refund of \$4,742.55 is due to the Personal Representative of the estate of Helen D. Bartosh and the Court does hereby order that this amount be refunded to the Personal Representative of the estate of Helen D. Bartosh.

5. Court costs are due herein in the amount of \$ -0.

Dated the 4 day of November, 2009.

BY THE COURT:

Marilyn L. Clapper
County Judge

CLERK MAGISTRATE



MISCELLANEOUS RECEIPT
COUNTY TREASURER'S OFFICE
DODGE COUNTY NEBRASKA

No. 8692

184,639.90

December 9, 2009

RECEIVED OF ESTATE OF HELEN D BARTOSH
the sum of One Hundred Eighty-Four Thousand Six Hundred Thirty-Nine Dollars
And Ninety Cents

collected by JUDI

for MISC RECT#C7562-AMENDED ORDER PR08-176 DATED
12/4/09

Credits To:

2700 INHERITANCE TAX 31001 \$184,639.90

2009 DEC 10 PM 3:43
FILED
JUDITH A. CLAPPER
COUNTY CLERK
DODGE COUNTY NEBRASKA

Cathy A Dill
County Treasurer
JUDI
Deputy

PR08-176



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