

I've read LTA 2015-063 and have a couple of suggested edits (underlined below):

In 462.040(b)(1): " ...To create original transferor status, a transaction must occur that either changes title to joint tenancy or adds an additional person to title as one of the joint tenants. ,,"

In 462.040(b) Example 6: "... as a joint tenant, after the transfer. Since it is not a joint tenancy described in subdivision (b)(1) of this rule, B does not become an original transferor."

Thanks!



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