

## CHECKLIST

### For Meeting with Legal Intern About Your Will

*Be prepared before you go.*

- Have you obtained your Individual Trust Inventory (ITI) from the BIA?  
(See attached form, which must be notarized)
- Have you obtained an Individual Indian Money (IIM) Report from the BIA?
- Create a list of the persons you intend to include in your Will.
- For each person you intend to include in your Will, you will need:
  - Date of birth
  - Current residence or mailing address
  - The person's Tribe
  - The person's enrollment number
- Call \_\_\_\_\_ to make an appointment with the Summer Legal Intern.
- Go to the Northern Idaho Agency, Room \_\_\_\_\_ for appointment on \_\_\_\_\_.
- Review and sign your Representation Agreement

Date: \_\_\_\_\_

The BIA Regional Office for the Nez Perce reservation is:

Northwest Regional Office Bureau of Indian Affairs  
911 NE 11th Ave  
Portland, OR 97332

To Whom It May Concern:

I am preparing a will and need a current list of my interests in trust property. Please provide me a list of any interests that I have in trust property anywhere in the United States, and the names, addresses, and interests of any co-owners of such property. Specifically, please provide me with a copy of my Individual Trust Interest (ITI) Report.

The following is my information:

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Enrollment Number)

\_\_\_\_\_  
(Social Security Number)

\_\_\_\_\_  
(Mailing Address)

\_\_\_\_\_  
(City, State, and Zip Code)

\_\_\_\_\_  
(Telephone Number)

You have my authorization to send the information to the following person(s) who is assisting me:

\_\_\_\_\_  
(Name)

c/o \_\_\_\_\_  
(Attorney or Assistant's Name)

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City, State, and Zip Code

I make this request pursuant to 5 U.S.C. § 552(a) and 25 U.S.C. §2216(e).

I look forward to your response. Thank you for your assistance with this matter.

Sincerely,

---

(Signature)

**CERTIFICATE OF ACKNOWLEDGMENT OF NOTARY PUBLIC**

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

This document was acknowledged before me on \_\_\_\_\_ [Date]  
by \_\_\_\_\_ [name of principal]

---

[Notary Seal, if any]:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
(Signature of Notary)  
Notary Public for the State of:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
My commission expires: \_\_\_\_\_

SEC. 2. The funds credited to the Shoshone-Bannock Tribes of the Fort Hall Reservation pursuant to section 1, may be advanced, deposited, expended, invested, or reinvested for any purposes that are authorized by the tribal governing body and approved by the Secretary of the Interior.

Tax exemption.

SEC. 3. None of the funds distributed per capita to members of the tribes under the provisions of this Act shall be subject to Federal or State income taxes. A share or interest payable to enrollees less than eighteen years of age or under legal disability shall be paid in accordance with such procedures, including the establishment of trusts, as the Secretary determines appropriate to protect the best interest of such persons.

Approved September 29, 1972.

### Public Law 92-443

September 29, 1972  
[H. R. 10436]

#### AN ACT

To provide with respect to the inheritance of interests in restricted or trust land within the Nez Perce Indian Reservation, and for other purposes.

Indians.  
Nez Perce  
Tribe, Idaho.  
Inheritance.

*Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled.* That a person who is not an enrolled member of the Nez Perce Tribe of Idaho with one-fourth degree or more blood of such Tribe shall not be entitled to receive by devise or inheritance any interest in trust or restricted land within the Nez Perce Indian Reservation or within the area ceded by the Treaty of June 11, 1855 (12 Stat. 957), if, while the decedent's estate is pending before the Examiner of Inheritance, the Nez Perce Tribe of Idaho pays to the Secretary of the Interior, on behalf of such person, the fair market value of such interest as determined by the Secretary of the Interior after appraisal. The interest for which such payment is made shall be held by the Secretary in trust for the Nez Perce Tribe of Idaho.

SEC. 2. On request of the Nez Perce Tribe of Idaho the Examiner of Inheritance shall keep an estate pending for not less than two years from the date of decedent's death.

SEC. 3. When a person who is prohibited by section 1 from acquiring any interest by devise or inheritance is a surviving spouse of the decedent, a life estate in one-half of the interest acquired by the Nez Perce Tribe of Idaho shall, on the request of such spouse, be reserved for that spouse and the value of such life estate so reserved shall be reflected in the Secretary's appraisal under section 1.

SEC. 4. The provisions of this Act shall apply to all estates pending before the Examiner of Inheritance on the date of this Act and to all future estates, but shall not apply to any estate heretofore closed.

Approved September 29, 1972.

### Public Law 92-444

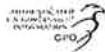
September 29, 1972  
[H. R. 12207]

#### AN ACT

To authorize a program for the development of tuna and other latent fisheries resources in the Central, Western, and South Pacific Ocean.

Central, West-  
ern, and South  
Pacific Fisheries  
Development Act.

*Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled.* That this Act may be cited as the "Central, Western, and South Pacific Fisheries Development Act".



(1) disburse appropriations authorized to accomplish the purposes of section 2212 of this title; and

(2) collect all revenues received from the lease, permit, or sale of resources from interests acquired under section 2212 of this title or paid by Indian landowners under section 2212 of this title.

**(b) Deposits; use**

**(1) In general**

All proceeds from leases, permits, or resource sales derived from an interest in trust or restricted lands described in subsection (a)(2) of this section shall—

(A) be deposited in the Acquisition Fund;

(B) as specified in advance in appropriations Acts, be available for the purpose of acquiring additional fractional interests in trust or restricted lands; and

(C) be used to acquire undivided interests on the reservation from which the income was derived.

**(2) Use of funds**

The Secretary may use the revenue deposited in the Acquisition Fund under paragraph (1) to acquire some or all of the undivided interests in any parcels of land in accordance with section 2204 of this title.

(Pub. L. 97-459, title II, §216, as added Pub. L. 106-462, title I, §103(6), Nov. 7, 2000, 114 Stat. 2002; amended Pub. L. 108-374, §6(a)(8), Oct. 27, 2004, 118 Stat. 1802.)

**AMENDMENTS**

2004—Subsec. (a)(2). Pub. L. 108-374, §6(a)(8)(A), added par. (2) and struck out former par. (2) which read as follows: “collect all revenues received from the lease, permit, or sale of resources from interests in trust or restricted lands transferred to Indian tribes by the Secretary under section 2212 of this title or paid by Indian landowners under section 2212(c) of this title.”

Subsec. (b)(1). Pub. L. 108-374, §6(a)(8)(B)(i), substituted “All” for “Subject to paragraph (2), all” in introductory provisions and added subpar. (C).

Subsec. (b)(2). Pub. L. 108-374, §6(a)(8)(B)(ii), added par. (2) and struck out heading and text of former par. (2). Text read as follows: “With respect to the deposit of proceeds derived from an interest under paragraph (1), the aggregate amount deposited under that paragraph shall not exceed the purchase price of that interest under section 2212 of this title.”

**§ 2216. Trust and restricted land transactions**

**(a) Policy**

It is the policy of the United States to encourage and assist the consolidation of land ownership through transactions—

(1) involving individual Indians;

(2) between Indians and the tribal government that exercises jurisdiction over the land; or

(3) between individuals who own an interest in trust and restricted land who wish to convey that interest to an Indian or the tribal government that exercises jurisdiction over the parcel of land involved;

in a manner consistent with the policy of maintaining the trust status of allotted lands. Nothing in this section shall be construed to apply to or to authorize the sale of trust or restricted lands to a person who is not an Indian.

**(b) Sales, exchanges and gift deeds between Indians and between Indians and Indian tribes**

**(1) In general**

**(A) Estimate of value**

Notwithstanding any other provision of law and only after the Indian selling, exchanging, or conveying by gift deed for no or nominal consideration an interest in land, has been provided with an estimate of the value of the interest of the Indian pursuant to this section—

(i) the sale or exchange or conveyance of an interest in trust or restricted land may be made for an amount that is less than the fair market value of that interest; and

(ii) the approval of a transaction that is in compliance with this section shall not constitute a breach of trust by the Secretary.

**(B) Waiver of requirement**

The requirement for an estimate of value under subparagraph (A) may be waived in writing by an owner of a trust or restricted interest in land either selling, exchanging, or conveying by gift deed for no or nominal consideration such interest—

(i) to an Indian person who is the owner's spouse, brother, sister, lineal ancestor, lineal descendant, or collateral heir; or

(ii) to an Indian co-owner or to the tribe with jurisdiction over the subject parcel of land, where the grantor owns a fractional interest that represents 5 percent or less of the parcel.

**(2) Limitation**

For a period of 5 years after the Secretary approves a conveyance pursuant to this subsection, the Secretary shall not approve an application to terminate the trust status or remove the restrictions of such an interest.

**(c) Acquisition of interest by Secretary**

An Indian, or the recognized tribal government of a reservation, in possession of an interest in trust or restricted lands, at least a portion of which is in trust or restricted status on November 7, 2000, and located within a reservation, may request that the interest be taken into trust by the Secretary. Upon such a request, the Secretary shall forthwith take such interest into trust.

**(d) Status of lands**

The sale, exchange, or conveyance by gift deed for no or nominal consideration of an interest in trust or restricted land under this section shall not affect the status of that land as trust or restricted land.

**(e) Land ownership information**

Notwithstanding any other provision of law, the names and mailing addresses of the owners of any interest in trust or restricted lands, and information on the location of the parcel and the percentage of undivided interest owned by each individual shall, upon written request, be made available to—

(1) other owners of interests in trust or restricted lands within the same reservation;

(2) the tribe that exercises jurisdiction over the land where the parcel is located or any

person who is eligible for membership in that tribe; and

(3) any person that is leasing, using, or consolidating, or is applying to lease, use, or consolidate, such trust or restricted land or the interest in trust or restricted lands.

**(f) Purchase of land by Indian tribe**

**(1) In general**

Except as provided in paragraph (2), before the Secretary approves an application to terminate the trust status or remove the restrictions on alienation from a parcel of, or interest in, trust or restricted land, the Indian tribe with jurisdiction over the parcel shall have the opportunity—

(A) to match any offer contained in the application; or

(B) in a case in which there is no purchase price offered, to acquire the interest in the parcel by paying the fair market value of the interest.

**(2) Exception for family farms**

**(A) In general**

Paragraph (1) shall not apply to a parcel of, or interest in, trust or restricted land that is part of a family farm that is conveyed to a member of the family of a landowner (as defined in section 2205(c)(2)(A)(iv) of this title) if the conveyance requires that in the event that the parcel or interest is offered for sale to an entity or person that is not a member of the family of the landowner, the Indian tribe with jurisdiction over the land shall be afforded the opportunity to purchase the interest pursuant to paragraph (1).

**(B) Applicability of other provision**

Section 2205(c)(2)(A) of this title shall apply with respect to the recording and mortgaging of any trust or restricted land referred to in subparagraph (A).

(Pub. L. 97-459, title II, §217, as added Pub. L. 106-462, title I, §103(6), Nov. 7, 2000, 114 Stat. 2002; amended Pub. L. 108-374, §6(a)(9), Oct. 27, 2004, 118 Stat. 1803; Pub. L. 109-157, §7, Dec. 30, 2005, 119 Stat. 2952.)

**AMENDMENTS**

2005—Subsec. (e). Pub. L. 109-157 substituted “be made available to—” for “be made available to”.

2004—Subsec. (b)(1)(B). Pub. L. 108-374, §6(a)(9)(A), added subpar. (B) and struck out heading and text of former subpar. (B). Text read as follows: “The requirement for an estimate of value under subparagraph (A) may be waived in writing by an Indian selling, exchanging, or conveying by gift deed for no or nominal consideration an interest in land with an Indian person who is the owner’s spouse, brother, sister, lineal ancestor of Indian blood, lineal descendant, or collateral heir.”

Subsec. (e). Pub. L. 108-374, §6(a)(9)(B), added introductory provisions and struck out former introductory provisions which read as follows: “Notwithstanding any other provision of law, the names and mailing addresses of the Indian owners of trust or restricted lands, and information on the location of the parcel and the percentage of undivided interest owned by each individual, or of any interest in trust or restricted lands, shall, upon written request, be made available to—”.

Subsec. (e)(1). Pub. L. 108-374, §6(a)(9)(C), struck out “Indian” before “owners”.

Subsec. (e)(3). Pub. L. 108-374, §6(a)(9)(D), substituted “any person that is leasing, using, or consolidating, or is applying to lease, use, or consolidate,” for “prospective applicants for the leasing, use, or consolidation of”.

Subsec. (f). Pub. L. 108-374, §6(a)(9)(E), added subsec. (f) and struck out heading and text of former subsec. (f). Text read as follows: “After the expiration of the limitation period provided for in subsection (b)(2) of this section and prior to considering an Indian application to terminate the trust status or to remove the restrictions on alienation from trust or restricted land sold, exchanged or otherwise conveyed under this section, the Indian tribe that exercises jurisdiction over the parcel of such land shall be notified of the application and given the opportunity to match the purchase price that has been offered for the trust or restricted land involved.”

**EFFECTIVE DATE OF 2005 AMENDMENT**

Amendment by Pub. L. 109-157 effective as if included in Pub. L. 108-374, see section 9 of Pub. L. 109-157, set out as a note under section 461 of this title.

**§ 2217. Reports to Congress**

**(a) In general**

Prior to expiration of the authority provided for in section 2212(a)(2)(A) of this title, the Secretary, after consultation with Indian tribes and other interested parties, shall submit to the Committee on Indian Affairs and the Committee on Energy and Natural Resources of the Senate and the Committee on Resources of the House of Representatives a report that indicates, for the period covered by the report—

(1) the number of fractional interests in trust or restricted lands acquired; and

(2) the impact of the resulting reduction in the number of such fractional interests on the financial and realty recordkeeping systems of the Bureau of Indian Affairs.

**(b) Report**

The reports described in subsection (a) of this section and section 2212(a) of this title shall contain findings as to whether the program under this chapter to acquire fractional interests in trust or restricted lands should be extended and whether such program should be altered to make resources available to Indian tribes and individual Indian landowners.

(Pub. L. 97-459, title II, §218, as added Pub. L. 106-462, title I, §103(6), Nov. 7, 2000, 114 Stat. 2004.)

**REFERENCES IN TEXT**

This chapter, referred to in subsec. (b), was in the original “this Act”, which was translated as reading “this title”, meaning title II of Pub. L. 97-459, to reflect the probable intent of Congress.

**CHANGE OF NAME**

Committee on Resources of House of Representatives changed to Committee on Natural Resources of House of Representatives by House Resolution No. 6, One Hundred Tenth Congress, Jan. 5, 2007.

**§ 2218. Approval of leases, rights-of-way, and sales of natural resources**

**(a) Approval by the Secretary**

**(1) In general**

Notwithstanding any other provision of law, the Secretary may approve any lease or agree-

# Planning for the Passing of Reservation Lands to Future Generations



Community Outreach  
and Assistance  
Partnership Program

March 2009

## FACT SHEET #4

### Your Individual Trust Interest (ITI) report: How to read it

Your Individual Trust Interest (ITI) report shows the *undivided interest* in land you own on any reservation in the United States. Your ITI report is generated from records held in the Regional Land Record Information System at the Bureau of Indian Affairs Land Title and Records Office. This fact sheet explains the meaning of the information on your ITI Report.

#### How do I get my Individual Trust Interest (ITI) report?

You can get a copy of your ITI report from:

- Your local Bureau of Indian Affairs realty office, or,
- Bureau of Indian Affairs regional office.

The form on pages 6 and 7 of this fact sheet can be used to request your ITI Report from the appropriate regional office.

The BIA Regional Office for the **Fort Peck**, **Blackfeet** and **Fort Belknap** reservations is:

Rocky Mountain Regional Office  
Bureau of Indian Affairs  
316 N. 26<sup>th</sup> Street  
Billings, MT 59101  
(406) 247-7943

The BIA Regional Office for the **Fort Hall** reservation is:

Northwest Regional Office  
Bureau of Indian Affairs  
911 NE 11<sup>th</sup> Ave  
Portland, OR 97232  
(503) 231-6702

#### Sample Individual Trust Interest (ITI) report

Your ITI report may contain information for allotments located on different reservations. Each item described on page 8 of this fact sheet uses information from a sample ITI report that was received by an enrolled tribal member in 2006. This ITI report is from the BIA Realty office on the Blackfeet Reservation in Montana. A report from your reservation may "look" different, but it will contain the same information.

## What do the numbers mean?

Your ITI report lists all your *undivided interests* in land and mineral rights as both fractional and aggregate decimal values. One of the **most important** pieces of information on your ITI report is the amount of *undivided interest* you own in each tract.

Your *undivided interest* is expressed as an **AGGREGATE DECIMAL** (such as .0173611111) and as a **FRACTION ACQUIRED** (such as 5/288). Under AIPRA, if you pass away without a written will, your *undivided interest* of **5% or more** in an allotment is distributed to your heirs under one set of rules (See Fact Sheet #6). If your *undivided interest* is **less than 5% in an allotment**, then your *undivided interest* is distributed under another set of rules (See Fact Sheet #7).

Below are the descriptions of information found on page 8 of the sample ITI Report. You may want to remove page 8 from this fact sheet so you can view the sample while studying the descriptions that follow.

### First Page of your ITI report:

The heading reads: BUREAU OF INDIAN AFFAIRS INDIVIDUAL/TRIBAL INTERESTS REPORT ALL TITLE HOLDINGS

#### Bottom Right Section of the Report

**A FRACTION ACQUIRED:** The fraction you own—your individual *undivided interest* in this tract is provided under the ----- line.

Example: 5  
288

In the example the fraction acquired is  $\frac{5}{288}$

**B AGGREGATE SHARE CONVERTED TO LCD:** LCD (lowest common denominator) is the total fraction you own in the allotment.

Example: 5  
288

In the example the aggregate share is the same as the

fraction acquired,  $\frac{5}{288}$

**AGGREGATE DECIMAL:** This is the total fraction expressed as a decimal. The fraction is converted to a decimal by dividing 5 by 288. In this example,  $5 \div 288 = .0173611111$ . This process is done for you and printed on the ITI form under the line ---AGGREGATE DECIMAL---.

Example: .0173611111

To determine the percentage of *undivided interest* you own, move the decimal two places to the right. In rounded percentage terms the *undivided interest* of this tract is about 1.736% (0.173611111).

Because this amount is **less than 5%**, the *undivided interest* is distributed under the *single heir rule* (if you pass away without a written will) that is explained in Fact Sheet #7.

If you pass away without a written will and your *undivided interest* is **5% or more** (such as  $.4545678911 = 45.45\%$ ), then this interest would

be distributed under the rules that are explained in Fact Sheet #6.

#### Upper Left Hand Corner of the Report

**D REPORT ID:** This is an internal code for security purposes.

Example: TA0007IR

**REQUESTOR:** These are the initials of the BIA employee who has processed your report.

Example: ADERICHE

**E -----OWNER----- BIRTHDATE:** 12/19/1979

The birth date of the current owner of this tract is December 19, 1979.

**TRB:** The initials TRB under the ---OWNER--- line mean tribe.

Example: Under TRB, the three numbers 201 appear. 201 is the number for the Blackfeet tribe in Montana.

**Middle of the Report, Left Section****TRACT ID**

**I** **LAC:** This is the reservation code where the tract is located. Listed below are the numbers for the reservations for which these fact sheets have been developed.

201: Blackfeet, MT  
204: Fort Belknap, MT  
206: Fort Peck, MT  
207: Fort Hall, ID

Example: 206 means that the tract is located on the Fort Peck reservation.

**PFX:** This stands for Prefix and is not important for determining whether interests are **5% or more or less than 5%**. Do not be concerned if no entry appears here.

1. T is for tribal
2. M is for mineral

**NUMBER:** This number identifies your specific tract within the computer system.

Example: 83

**SFX-** This stands for Suffix and is part of the tract numbering system. Usually, when a tract is subdivided it is assigned an A, B, C, etc. (-A or -B means split tract). Do not be concerned if no entry appears here.

**H** **PAGE:** Page number for the report

Example: PAGE: 1

**DATE:** The date the report was requested.

Example: DATE: 2/20/2006

**CST TIME:** This is the time that the report was printed out for you. In this example CST stands for Central Standard Time.

Example: CST TIME: 12:04:13

**K** **LAND AREA:** Reservation where the tract is located.

Example: BILLINGS MT

**L** **RESOURCES-** This section describes what type of rights you own.

- **Both** means surface and mineral rights
- **Surface** means surface rights only (land)

- **Mineral** means mineral rights only (for example, oil, gravel, gas, coal)

Example: BOTH

BOTH means that Tara owns both the surface and mineral rights in this tract.

-----**DATE OF LAST**-----

**M** **ExamDate:** This is the date of the last activity in this report. If you had previously ordered an ITI Report or had other activity such as purchasing land, that date would appear here.

Example: 5/12/97

**VerfDate:** Not important for determining the ownership interests. Do not be concerned if zeros appear here.

Example: 0/00/0000

**\*\*ORIGINAL ALLOTTEE \*\***

**N** The name of the original allottee appears just above this wording. In this example, Sam Bowe was the original allottee.

Example: BOWE, SAM  
**\*\*ORIGINAL ALLOTTEE\*\***

**O** Under the name of the original allottee, a series of numbers, letters and words appear.

Example:

SEC TOWNSHIP RANGE COUNTY ST MERIDIAN  
16 027.000N 052.00E Roosevelt MT Principal

The numbers under SEC, TOWNSHIP, RANGE, etc. provide the specific legal description of the location of the tract.

This tract is located in **Section (SEC)** 16 of **Township** 27 North, **Range** 52 East, Roosevelt **County** in the state (ST) of Montana. This description allows you to locate your land on a map. A meridian is one of the lines on a map of the earth's

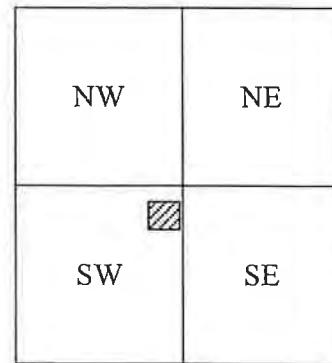
surface that passes through the north and south poles. In this example the meridian is **Principal**.

**P** **LEGAL DESCRIPTION** is listed to the right of the Meridian.

1. **NE** means (Northeast)
2. **NW** means (Northwest)
3. **SW** means (Southwest)
4. **SE** means (Southeast)

Example: E NE SW

This means that the tract is located in the East half of the NE quarter of the SW quarter of the allotment. The general location of this parcel is marked on the illustration below (■).



**Q** **SECTION COUNTY ACRES** - These are the number of acres in this tract.

Example: 20.000

Keep in mind that there may be more than one land description in the tract. This is summed up in the **CUM SECTION ACRES**. CUM means cumulative...or the total acreage owned.

Example: 20.000

*This number is somewhat misleading as it implies that Tara owns an actual 20 acre parcel. Instead, Tara owns an **undivided interest** that is equivalent to 20 acres in this particular allotment.*

## Bottom Left Section of the Report

**R** These are a series of letters and numbers that are not important for determining the level of fractionation.

### -----Owner-----

TYP	OT	INT
-----	----	-----

I	T	A
---	---	---

### -----Document-----

CLS	TYP	NUMBER
11	IT	TC124R988

**S** **NAME IN WHICH FIRST ACQUIRED** is the name you used when you first acquired the land. The BIA actually tracks all land ownership by enrollment number and not by name, so don't be concerned if a variation of your name appear in this section.

Example: BIRD SWING, TARA LYNN

An \*\*\*End of report\*\*\* notation appears on the last page of the report. This sample report was 15 pages in length.

## Summary

Your Individual Trust Interest (ITI) report shows the amount of *undivided interest* in land you own. If you have *undivided interest* in allotments located on different reservations your ITI report will show how much you own and where.

Your ITI report lists all your land and mineral rights holdings in the fractional or aggregate decimal values you own in each allotment. You will need this information to make decisions about how you want your property to be distributed upon your passing.

You can use the form reproduced on pages 6 and 7 of this fact sheet to order your ITI Report from your BIA Regional Office.

## Acknowledgements

We wish to express appreciation to the Montana and Idaho Reservation Extension agents and Reservation Extension student assistants on the Blackfeet, Fort Belknap, Fort Hall, and Fort Peck reservations for their assistance in reviewing the fact sheets and presenting the information to tribal members on their home reservations.

### Co-authors:

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and Economics  
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Montana State University

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## Disclaimer

The information appearing in this fact sheet is presented for informational purposes only. The objective of the fact sheet is to help you develop an understanding of the American Indian Probate Reform Act (AIPRA). The contents should not be considered as legal advice or be used as such. For legal information specific to your situation contact appropriate legal counsel with your tribe or an attorney.

Future change in laws cannot be predicted and statements in this fact sheet are based solely on the rules and regulations in force on the date of publication.

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Date: \_\_\_\_\_

The BIA Regional Office for the **Fort Peck, Blackfeet** and **Fort Belknap** reservations is:

Rocky Mountain Regional Office  
Bureau of Indian Affairs  
316 N. 26<sup>th</sup> Street  
Billings, MT 59101

The BIA Regional Office for the **Fort Hall** reservation is:

Northwest Regional Office  
Bureau of Indian Affairs  
911 NE 11<sup>th</sup> Ave  
Portland, OR 97332

To Whom It May Concern:

I am preparing a will and need a current list of my interests in trust property. Please provide me a list of any interests that I have in trust property anywhere in the United States, and the names, addresses, and interests of any co-owners of such property. Specifically, please provide me with a copy of my **Individual Trust Interest (ITI) Report**. The following is my information:

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Enrollment Number)

\_\_\_\_\_  
(Social Security Number)

\_\_\_\_\_  
(Mailing Address)

\_\_\_\_\_  
(City, State, and Zip Code)

\_\_\_\_\_  
(Telephone Number)

You have my authorization to send the information to the following person(s) who is assisting me:

\_\_\_\_\_  
(Name)

c/o \_\_\_\_\_  
(Attorney or Assistant's Name)

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City, State, and Zip Code

I make this request pursuant to 5 U.S.C. § 552(a) and 25 U.S.C. §2216(e). I look forward to your response. Thank you for your assistance with this matter.

Sincerely,

(Signature)

**CERTIFICATE OF ACKNOWLEDGMENT OF NOTARY PUBLIC**

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

This document was acknowledged before me on \_\_\_\_\_ [Date] by  
\_\_\_\_\_  
[name of principal]

[Notary Seal, if any]:

\_\_\_\_\_  
(Signature of Notary)

Notary Public for the State of:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My commission expires:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

REPORT ID: TA0071R  
REQUESTOR: ADERICHE

**BUREAU OF INDIAN AFFAIRS  
INDIVIDUAL/TRIBAL INTERESTS REPORT  
ALL TITLE HOLDINGS**

PAGE: 1  
DATE: 2/20/2006  
CST TIME: 12:04:13

**E** -----OWNER-----  
TRB CL NUMBER  
201 U 017693

ш

BIRTHDATE: 12/1/

LAST NAME	BIRD SWING		
LAST NAME	BIRD SWING		
LAST NAME	BIRD SWING		
<b>G</b> - NAMES OR ALIASES			
FAMILY NAME			
TARA			
FAMILY NAME			
TARA LYNN			
MIDDLE NAME			
LYNN			
<b>I</b> - - - - - TRACT ID - - - - -			
TRACT LAC	TRACT PFX	TRACT NUMBER	TRACT ID
206	206	83	206
<b>J</b> - - - - - TITLE			
SFX			
PLANT			
BILLINGS, MT			
LAND AREA			
FORT PECK			
<b>K</b>			
RESOURCES			
BOTH			
<b>M</b> - - - - - DATE OF LAST - - - - -			
ExamDate /			
5/12/1997			
VerfDate			
00/00/0000			

**N** BOWE, SAM  
\*\* ORIGINAL ALIOTEE \*\*

N BOWE, SAM		P		Q	
** ORIGINAL ALLOTEE **		SECTION COUNTY ACRES		CUM SECTION COUNTY ACRES	
SEC 16	TOWNSHIP 027.000N	RANGE 052.00E	COUNTY ROOSEVELT	ST MERIDIAN MT Principal	CUM SECTION ACRES 20.000

TOTAL SECTION ACRES:							20.000	20.000	
---OWNER---			---DOCUMENT---		NAME IN WHICH FIRST ACQUIRED		(A) FRACTION ACQUIRED	(B) CONVERTED	SHARE TO LCD
TYP	OT	INT	CLS	TYP	NUMBER				AGGREGATE DECIMAL
I	T	A	11	IT	TC124R988	BIRD SWING, TARA LYNN			.0173611111

REPORT CONT...

Cornell Law School



U.S. Code › Title 5 › Part I › Chapter 5 › Subchapter II › § 552a

## 5 U.S. Code § 552a - Records maintained on individuals

### (a) **DEFINITIONS.**—For purposes of this section—

- (1) the term “agency” means agency as defined in section 552(e) [1] of this title;
- (2) the term “individual” means a citizen of the United States or an alien lawfully admitted for permanent residence;
- (3) the term “maintain” includes maintain, collect, use, or disseminate;
- (4) the term “record” means any item, collection, or grouping of information about an individual that is maintained by an agency, including, but not limited to, his education, financial transactions, medical history, and criminal or employment history and that contains his name, or the identifying number, symbol, or other identifying particular assigned to the individual, such as a finger or voice print or a photograph;
- (5) the term “system of records” means a group of any records under the control of any agency from which information is retrieved by the name of the individual or by some identifying number, symbol, or other identifying particular assigned to the individual;
- (6) the term “statistical record” means a record in a system of records maintained for statistical research or reporting purposes only and not used in whole or in part in making any determination about an identifiable individual, except as provided by section 8 of title 13;
- (7) the term “routine use” means, with respect to the disclosure of a record, the use of such record for a purpose which is compatible with the purpose for which it was collected;
- (8) the term “matching program”—
  - (A) means any computerized comparison of—
    - (i) two or more automated systems of records or a system of records with non-Federal records for the purpose of—
      - (I) establishing or verifying the eligibility of, or continuing compliance with statutory and regulatory requirements by, applicants for, recipients or beneficiaries of, participants in, or providers of services with respect to, cash or in-kind assistance or payments under Federal benefit programs, or
      - (II) recouping payments or delinquent debts under such Federal benefit programs, or
    - (ii) two or more automated Federal personnel or payroll systems of records or a system of Federal personnel or payroll records with non-Federal records,

REPORT-ID: TAC001R  
REQUESTOR: WDOO

BUREAU OF INDIAN AFFAIRS  
INVENTORY OF DESCENDENTS REPORT  
ALL TITLE HOLDINGS

PAGE: 1  
DATE: 04/25/2010  
CST TIME: 03:24 PM

---OWNER---  
TRB CL NUMBER

BIRTHDATE: 05/24/1954

DEATHDATE: 07/06/2010

123 U 486789

----- NAMES OR ALIASES -----  
LAST NAME FIRST NAME MIDDLE NAME

BLACK BEAR JOE S

-----TRACT ID----- TITLE  
LAC PFX NUMBER SEX PLANT LAND AREA RESOURCES -----DATE OF LAST-----  
EXAMINATION/VERIFICATION

344 920 -C ABERDEEN PINE RIDGE Surface 06/30/2000 00/00/0000

RICHARD BLACK BEAR  
\*\* ORIGINAL ALLOTTEE \*\*  
SECTION CLM  
COUNTY SECTION  
68C TOWNSHIP RANGE COUNTY ST MERIDIAN LEGAL DESCRIPTION ACRES ACRES  
25 044.00N 038.00W SHANNON SD Sixth Principal SE 160.000 160.000  
TOTAL SECTION ACRES: 160.000 160.000

---OWNER--- ---DOCUMENT--- NAME IN WHICH ACQUIRED FRACTION OF TRACT TOTAL ESTIMATED  
TYP OF INT OLC TYP NUMBER (SURNAME/FIRST NAME) (-/-)S ACQUIRED VALUE

1 T A 11 IT B1554C971 BLACK BEAR 1  
90

OWNER TO OF THE PERSON THEY RECEIVED FROM

\$10,043.00

INDIVIDUAL SHARE AGGREGATE SHARE AGGREGATE  
MONETARY VALUE CONVERTED TO LAC DECIMAL  
\$ 111.59 .011111111

REPORT CONT....

OFFICE OF THE SPECIAL TRUSTEE  
FOR AMERICAN INDIANS



IF YOU HAVE ANY QUESTIONS,  
PLEASE CALL 888.673.6836  
TRUST BENEFICIARY CALL CENTER  
HOURS OF OPERATION:  
MONDAY - FRIDAY: 8:00AM - 6:00PM (MT)  
SATURDAY: 8:00AM - NOON (MT)

INDIVIDUAL INDIAN MONIES  
*Statement of Performance*



JOE BLACK BEAR  
PO Box 123  
PINE RIDGE, SD 57770-1609 69534

ACCOUNT OF JOE BLACK BEAR  
1230456789

TRANSACTION ACTIVITY FOR ACCOUNTING PERIOD: 10/01/09 THROUGH 12/31/09

DATE	TRANSACTION DESCRIPTION	CASH
	BEGINNING BALANCES	0.00
10/03/09	CASH RECEIPT ESTATE DISTRIBUTION PAID FROM ACCOUNT # 1230456789 J700TPC99430 9/22/09 P-00C045430-TP 6/4/09	1,046.86
10/03/09	CASH RECEIPT MONTHLY INCOME EARNED SEP 2009 INCOME AT THE ANNUALIZED RATE OF 4.97%	3.87
10/14/09	CASH DISBURSEMENT PAID TO JOE BLACK BEAR PO BOX 123 PINE RIDGE SD 57770 ACCOUNT BALANCE T/A CHECK # 13433025	-1,047.73
10/29/09	CASH RECEIPT RANGE CT10A385403 121095 LEASE NUMBER: 560 6/8912345 - EP 08162006 LESSOR: PAUL KRACKE TRACT ID: 456 7990 INVOICE #: 133980 PAYMENT DUE: 11/01/2009 OWNERSHIP: 0.0412655557	93.27
10/30/09	CASH RECEIPT FARM PASTURE CT10A3860052 , 121914 LEASE NUMBER: 234 997654221-99 GP 08442006 LESSOR: NOAH BATES TRACT ID: 123 4567 INVOICE #: 133982 PAYMENT DUE: 11/01/2009 OWNERSHIP: 0.0250005553	55.74
10/30/09	CASH RECEIPT TELEPHONE CT10A389943 , 121914 LEASE NUMBER: 000 456100123 GP 08162006 LESSOR: MARA TELECOM TRACT ID: 321 5678 INVOICE #: 133982 PAYMENT DUE: 11/01/2009 OWNERSHIP: 0.0564333033	16.24