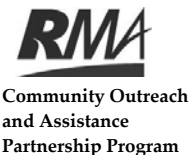


Planning for the Passing of Reservation Lands to Future Generations



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. 26th 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 11th 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: $\frac{5}{288}$

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: $\frac{5}{288}$

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.

CL: Is a classification that provides a code to indicate the method of property transfer. "A" means original allottee, "U" means was not allotted, "N" means non-Indian, "X" means non-member or business.

Example: U

NUMBER: Your tribal enrollment number appears here.

Example: 017693

F **TRIBE NAME:** The name of your tribe and the state where it is located appears here.

Example: TRIBE NAME
BLACKFEET, MT

-----**NAMES OR ALIASES**-----

G Your name or aliases appear here in the order of last name, first name, and middle name. The BIA tracks all land ownership by enrollment number and not by name. If an alias appears in this section that you no longer use, do not be concerned.

Example:

LAST NAME	FIRST NAME	MIDDLE NAME
BIRDSWING	TARA	LYNN
BIRDSWING	TARA LYNN	

Upper Right Hand Corner of the Report

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

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.

J **TITLE PLANT:** Is the location of the regional BIA office.

Example: BILLINGS MT

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

Example: FORT PECK

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

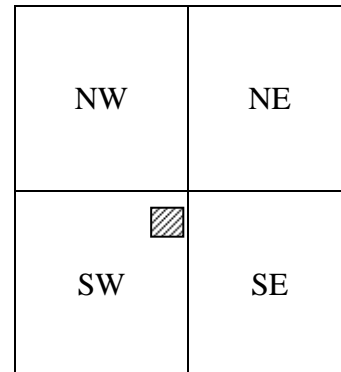
surface that passes through the north and south poles. In this example the meridian is **Principal**.

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: BIRDSWING, 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.

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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: _____

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

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

D

REPORT ID: TA0071R
REQUESTOR: ADERICHE

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

H

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

E

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

F

TRIBE NAME
BLACKFEET, MT

E

BIRTHDATE: 12/19/1979

G

-----NAMES OR ALIASES-----
LAST NAME FIRST NAME MIDDLE NAME
BIRDSWING TARA LYNN
BIRDSWING TARA LYNN

I

-----TRACT ID-----
LAC PFX NUMBER SFX
206 83

J

TITLE PLANT
BILLINGS, MT

K

LAND AREA
FORT PECK

L

RESOURCES
BOTH

M

-----DATE OF LAST-----
ExamDate / VerfDate
5/12/1997 0/00/0000

N

BOWE, SAM
** ORIGINAL ALLOTEE **

O

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

P

LEGAL DESCRIPTION
E NE SW

Q

SECTION CUM
COUNTY SECTION
ACRES ACRES
20.000 20.000

R

-----OWNER----- -----DOCUMENT-----
TYP OT INT CLS TYP NUMBER

S

NAME IN WHICH FIRST ACQUIRED

A

FRACTION ACQUIRED

B

AGGREGATE SHARE AGGREGATE
CONVERTED TO LCD DECIMAL

C

TOTAL SECTION ACRES: 20.000 20.000

I T A 11 IT TC124R988 BIRDSWING, TARA LYNN 5 5 .0173611111
288 288

REPORT CONT...