Cipparone & Zaccaro, PC

ESTATE SETTLEMENT DATA SHEET

Decedent’s name (include all names Decedent’s social security

under which assets are held): number:

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decedent’s date of death (compare

 with death certificate, if family

Decedent’s address: does not have any, arrange to obtain)

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decedent’s date of birth: \_\_\_\_\_\_\_\_\_\_\_

Date of Will and Codicils (ask to see originals, or if originals not immediately available, establish where they are):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Location of safe deposit box; if joint, with whom:

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Name and address of fiduciaries. If named executor/executrix intends to serve, obtain executor’s social security number, if not, obtain declination:

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Name of surviving spouse (partner): Address (if different from above):

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Surviving spouse’s social

security number: Surviving spouse’s date of birth and country in which spouse was born:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If decedent’s spouse predeceased, date of death: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is Surviving Spouse a U.S. citizen? If not, of what country is the surviving spouse a citizen? \_\_\_\_\_\_\_\_\_\_\_\_\_ Does he or she wish to place any non-probate property passing to her in a “Qualified Domestic Trust?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ If surviving spouse is a U.S. citizen but was not born in the U.S., when did the surviving spouse acquire citizenship? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Names and addresses and dates of birth of any beneficiaries under will or trust. If taxable estate, also need Social Security Numbers of all beneficiaries:

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Names and addresses of intestate heirs - *(if* minor, provide date of birth):

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Are children, if any, also children of surviving spouse:

\_\_\_\_\_\_\_\_\_No \_\_\_\_\_\_\_\_\_\_\_Yes

Did decedent, spouse or any children receive public assistance:

\_\_\_\_\_\_\_\_\_No \_\_\_\_\_\_\_\_\_\_\_Yes

Was decedent divorced, if so, date of decree and name of court granting decree (it will be necessary to obtain a copy of the decree and any property settlement agreement):

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Name of funeral home; request copy of bill; is there a family plot? If so, who owned?

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Did decedent create any revocable trusts, including trustee bank accounts, during his or her life? Yes No. If yes, what is the date of each trust and who are the beneficiaries of each trust? Please provide a copy of each trust document. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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If decedent had a taxable estate, were there any trusts not created by decedent under which the decedent possessed any power of appointment, a beneficial interest, or was a trustee? Was the decedent the custodian of any UTMA accounts? Was there a GST taxable termination upon the death of the decedent? Was the decedent the beneficiary of any marital trust? \_\_\_\_\_\_\_\_\_\_\_\_\_\_

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If decedent had a taxable estate, did the decedent own any articles of artistic or collectible value in excess of $3,000 or collections whose combined value exceeded $10,000? Yes No

**ASSETS**:

Bank accounts in decedent’s name alone (names and numbers):

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Joint bank accounts (same information needed):

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Real Property in decedent’s name. - Address; obtain copy of deed. Is there a mortgage on property? Any real estate or time share in another state? Did decedent transfer any real estate retaining a life use in himself/herself? :

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Stocks and bonds in decedent’s name alone (including U.S. War or Savings Bonds) (get names of broker, if family has dealt with one); are dividends being reinvested?

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Joint Stock and Bonds (including U.S. War or Savings Bonds)

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Cars (make and model, mileage is helpful) in decedent’s name alone or joint; will car be distributed or sold; notify insurance agent

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Household contents (furniture, etc.); determine if appraisal is recommended, distribute or sell

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Jewelry, Furs, Antiques, Collections (stamps, guns, coins, etc.) (preferred appraiser):

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Life insurance: - obtain company and policy number, location of original policy, agent’s name and address, decedent own any policies on the lives of others? Is there a Crummey Trust? Was any policy transferred by decedent within 3 years of death? Any Form 712s received? Did decedent own an interest in life insurance on the life of another? If so, get cash surrender value.

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IRA’s: Does beneficiary wish to defer tax until his/her death?

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Annuities: Private, Charitable and Commercial, Payee or Payor,

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Pension: Public (403(b) or 457 plans) or Private (401(k) plans, Stock Options, Profit Sharing Plans). Will you rollover or forward average the death benefit?

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Partnerships: (obtain K-1’s from prior years; consider Section 754(b) election)

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Closely held business interest: (will need buy-sell agreements, any offers to purchase, estimated value of shares and how arrived at, current balance sheet, last *5* years tax returns, list of all shareholders, # of shs each owns, how and when acquired, type of Co., list of directors)

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Mortgages:

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Promissory notes: (Borrow or Lender, Co-sign or guaranteed)

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Did decedent make any gifts within three years, file any gift tax returns; make any gifts of closely held stock valued at under $14,000?

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Name of decedent’s accountant (arrange to obtain copy of decedent’s prior 1040): Who will complete final 1040?

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Was decedent a veteran: (Was veteran receiving disability benefits prior to death?)

\_\_\_\_\_\_\_\_\_No \_\_\_\_\_\_\_\_\_\_\_Yes

If decedent lived alone, name of conservator, if one appointed:

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Any need to file quarterly return Form 942 or 940 for household help?

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If house owned by decedent and no immediate survivors, what arrangements to be made for care and upkeep of property, name of insurance agent: sale, preferred agent

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