

Life Insurance Statement for a Decedent (Insured)

(To be filed by executor with Federal Estate Tax Return, Form 706)

1 Decedent's first name and middle initial	2 Decedent's last name	3 Date of death
4 Name of insurance company		5 Decedent's social security number (if known)
6 Kind of policy		7 Policy number
8 Names of beneficiaries		

9 Face amount of policy	\$
10 Principal of any indebtedness to the company deductible in determining net proceeds	\$
11 Interest on indebtedness (item 10) accrued to date of death	\$
12 Amount of accumulated dividends	\$
13 Amount of post-mortem dividends	\$
14 Amount of returned premium	\$
15 Amount of proceeds if payable in one sum	\$
16 Value of proceeds as of date of death (if not payable in one sum)	\$
17 Date of issue of policy ▶	\$
18 Amount of premium	\$

19 (a) Provisions of policy with respect to the deferred payments or to the installments.
Note: Where marital deduction under Code section 2056 is involved, if other than lump sum settlement authorized, copy of insurance policy should be attached.

(b) Amount of installments \$

(c) Date of birth and name of any person the duration of whose life may measure the number of payments.

(d) Amount applied by the insurance company as a single premium representing the purchase of installment benefits \$

(e) Basis (Mortality table and rate of interest) used by insurer in valuing installment benefits.

20 Was the insured the annuitant or beneficiary of any annuity contract issued by the company? Yes No

21 Names of companies with which decedent carried other policies and amount of such policies if this information is disclosed by your records.

The undersigned officer of the above-named insurance company hereby certifies that this statement sets forth correct and true information.

Signature ▶ Title ▶ Date of Certification ▶

Instructions

Purpose of Statement.—The information shown by this statement is required for the purpose of determining the statutory gross estate of the insured for Federal estate tax purposes.

Statement of Insurer.—This statement must be made, on behalf of the insurance company which issued the policy, by an

officer of the company having access to the records of the company. For purposes of this statement, a facsimile signature may be used in lieu of a manual signature and, if used, shall be binding as a manual signature.

Duty to File.—It is the duty of the executor to procure this statement from the in-

surance company and file it with the return. However, if specifically requested, the insurance company should file this statement directly with the official of the Internal Revenue Service making the request.

Separate Statements.—A separate statement must be filed for each policy listed on the return which constituted a part of the gross estate.