

Life Insurance Statement

Part I Decedent—Insured
(File 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. <i>Note: If other than lump sum settlement authorized for a surviving spouse, copy of insurance policy should be attached.</i> _____ _____ _____	\$
(b) Amount of installments	\$
(c) Date of birth, sex, 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? <input type="checkbox"/> Yes <input type="checkbox"/> 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 true and correct information.

Signature ► Title ► Date of Certification ►

Instructions

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.

Separate Statements.—A separate statement must be filed for each policy.

Part II Living Insured
(File with Federal Gift Tax Return, Form 709. May be Filed with Federal Estate Tax Return, Form 706, where Decedent Owned Insurance on Life of Another)

SECTION A.—General Information

1 (a) First name and middle initial of donor (or decedent)	(b) Last name	(c) Social security number
2 Valuation data with respect to:		
(a) Date of gift	▶	
(b) Date of decedent's death	▶	

SECTION B.—Policy Information

3 (a) Name of insured	(b) Sex	(c) Date of birth	
4 (a) Name of insurance company	(b) Kind of policy		
(c) Policy number	(d) Face amount	(e) Date of issue	
(f) Gross premium	(g) Frequency of payment		
5 If assignment made:		(b) Date assigned	
(a) Name of assignee			
6 If irrevocable designation of beneficiary made:	(b) Sex	(c) Date of birth, if known	(d) Date designated
(a) Name of beneficiary			
(e) If other than simple designation, quote in full. (Attach additional sheet if necessary.)			

7 If policy is not paid-up:		
(a) Interpolated terminal reserve on date of assignment or irrevocable designation of beneficiary		
(b) Add proportion of gross premium paid beyond date of assignment or irrevocable designation of beneficiary		
(c) Add adjustment on account of dividends to credit of policy		
(d) Total (add amounts on lines (a), (b), and (c))		
(e) Outstanding indebtedness against policy		
(f) Net total value of the policy (for gift or estate tax purposes) (subtract amount on line (e) from amount on line (d))		
8 If policy is either paid-up or a single premium:		
(a) Total cost, on date of assignment or irrevocable designation of beneficiary, of a single-premium policy on life of insured at attained age, for original face amount plus any additional paid-up insurance (additional face amount \$.....). (If a single-premium policy for the total face amount would not have been issued on the life of the insured as of the date specified, nevertheless, assume that such a policy could then have been purchased by the insured and state the cost thereof, using for such purpose the same formula and basis employed, on the date specified, by the company in calculating single premiums.)		
(b) Adjustment on account of dividends to credit of policy		
(c) Total (add amounts on line (a) and line (b))		
(d) Outstanding indebtedness against policy		
(e) Net total value of policy (for gift or estate tax purposes) (subtract amount on line (d) from amount on line (c))		

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