

Compendium of Federal Estate Tax and Personal Wealth Studies

Form 706
April, August 1975

United States Estate (and Generation-Skipping Transfer) Tax Return

Estate of a citizen or resident of the United States (see separate instructions). To be filed for decedents dying after October 3, 1963. For Paperwork Reduction Act Notice, see page 1 of the instructions.

1. Decedent's full name and middle initial and maiden name, if any
2. Decedent's social security no.
3. Decedent's date of birth
4. Date of death
5. Date of decedent's last illness

6. Decedent's domicile at time of death (county and state, or foreign country)
7. Decedent's address number and street, including apartment or suite no. or rural route, city, town, or post office, state, and ZIP code

8. Name of executor (see instructions)
9. Case number

10. Name and location of court where will was probated or estate administered

11. If decedent died testate, check here and attach a certified copy of the will. If Form 4706 is attached, check here

12. If Schedule R-1 is attached, check here

13. Total gross estate (from Part 5, Instructions, page 3, item 10)
14. Total allowable deductions (from line 13)
15. Total taxable estate (from line 13 minus line 14)
16. Adjusted taxable gifts (total taxable gifts (within the meaning of section 2009) made by the decedent after December 31, 1976, other than gifts that are includable in decedent's gross estate (section 2001(b)) after December 31, 1976, plus the amount on line 15 from Table A in the instructions)
17. Total gift tax payable with regard to gifts made by the decedent after December 31, 1976, include gift taxes paid by the decedent's spouse for such spouse's estate of split gifts (section 2013) only if the decedent was the donor of those gifts and they are includable in the decedent's gross estate (see instructions) (from line 15)
18. Total gift tax payable (from line 16 plus line 17)
19. Total estate tax payable (from line 15 minus line 18)
20. Credit against estate tax (from line 18)
21. Total estate tax payable (from line 19 minus line 20)
22. Total tax payable (from line 21 plus line 17)
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