



New York State Estate Tax Return / Schedules A-D

for estates not required to file federal Form 706

Estate of _____	Social security number _____
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Schedule A – Real estate (report jointly owned property on Schedule E of Form ET-90.2; attach additional sheets if necessary)

A Item number	B Description	C Assessed value	D Alternate valuation date	E Alternate value	F Value at date of death
1					
Total from additional sheet(s) attached to this schedule					
1 Total columns E and F – If alternate valuation was elected, enter the total of column E on Form ET-90, page 2, line 23; otherwise, enter the total of column F				1	

Schedule B – Stocks and bonds (report jointly owned property on Schedule E of Form ET-90.2; attach additional sheets if necessary)

A Item number	B Description	C Unit value	D Alternate valuation date	E Alternate value	F Value at date of death
1					
Total from additional sheet(s) attached to this schedule					
2 Total columns E and F – If alternate valuation was elected, enter the total of column E on Form ET-90, page 2, line 24; otherwise, enter the total of column F				2	

Attach additional sheets if necessary

Schedule C – Mortgages, notes, cash, and bank deposits *(report jointly owned property on Schedule E of Form ET-90.2)*

A Item number	B Description	C Alternate valuation date	D Alternate value	E Value at date of death
1				
Total from additional sheet(s) attached to this schedule				
3 Total columns D and E – If alternate valuation was elected, enter the total of column D on Form ET-90, page 2, line 25; otherwise, enter the total of column E		3		

Schedule D – Insurance on the decedent’s life

A Item number	B Description	C Alternate valuation date	D Alternate value	E Value at date of death
1				
Total from additional sheet(s) attached to this schedule				
4 Total columns D and E – If alternate valuation was elected, enter the total of column D on Form ET-90, page 2, line 26; otherwise, enter the total of column E		4		