



# New York State Estate Tax Return / Schedules A – D

for estates not required to file federal Form 706

|                 |                              |
|-----------------|------------------------------|
| Estate of _____ | Social security number _____ |
|-----------------|------------------------------|

**Schedule A – Real Estate** *(report jointly owned property on Schedule E; attach additional sheets if necessary)*

| A<br>Item<br>Number   | B<br>Description | C<br>Assessed<br>Value | D<br>Alternate<br>Valuation Date | E<br>Alternate<br>Value | F<br>Value at<br>Date of Death |
|---|------------------|------------------------|----------------------------------|-------------------------|--------------------------------|
| 1   |                  |                        |                                  |                         |                                |
| Total from additional sheet(s) attached to this schedule .....  |                  |                        |                                  |                         |                                |
| <b>1 Total</b> – 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 ..... |                  |                        |                                  |                         | <b>1</b>                       |

**Schedule B – Stocks and Bonds** *(report jointly owned property on Schedule E; attach additional sheets if necessary)*

| A<br>Item<br>Number   | B<br>Description | C<br>Unit<br>Value | D<br>Alternate<br>Valuation Date | E<br>Alternate<br>Value | F<br>Value at<br>Date of Death |
|---|------------------|--------------------|----------------------------------|-------------------------|--------------------------------|
| 1   |                  |                    |                                  |                         |                                |
| Total from additional sheet(s) attached to this schedule .....  |                  |                    |                                  |                         |                                |
| <b>2 Total</b> – 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 ..... |                  |                    |                                  |                         | <b>2</b>                       |

**Attach additional sheets if necessary**

**Schedule C – Mortgages, Notes, Cash and Bank Deposits** *(report jointly owned property on Schedule E)*

| A<br>Item<br>Number | B<br>Description | C<br>Alternate<br>Valuation Date | D<br>Alternate<br>Value | E<br>Value at<br>Date of Death |
|---------------------|------------------|----------------------------------|-------------------------|--------------------------------|
| 1                   |                  |                                  |                         |                                |

Total from additional sheet(s) attached to this schedule .....

**3 Total** – 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<br>Item<br>Number | B<br>Description | C<br>Alternate<br>Valuation Date | D<br>Alternate<br>Value | E<br>Value at<br>Date of Death |
|---------------------|------------------|----------------------------------|-------------------------|--------------------------------|
| 1                   |                  |                                  |                         |                                |

Total from additional sheet(s) attached to this schedule .....

**4 Total** – 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 .....

**4**