



New York State Estate Tax Return / Schedules E – G
for estates not required to file federal Form 706

Estate of \_\_\_\_\_ Social security number \_\_\_\_\_

Schedule E – Jointly Owned Property (attach additional sheets if necessary)

Part I – Qualified joint interests (interests held by the decedent and decedent's spouse as the only joint tenants) – Note: If the surviving spouse is not a citizen of the United States, the interest is not a qualified joint interest and must be reported in Part II below, even when the election provided in section 955(e)(2) of the Tax Law is made.

Table with 5 columns: A Item Number, B Description, C Alternate Valuation Date, D Alternate Value, E Value at Date of Death. Includes summary rows for total and amounts included in gross estate.

Part II – All other joint interests

Table with 6 columns: A Item Number, B Description, C Name of Joint Tenant and Relationship to Decedent, D Alternate Valuation Date, E Alternate Value, F Value at Date of Death. Includes summary rows for total and final summary calculation.

**Attach additional sheets if necessary**

**Schedule F – Other Miscellaneous Property not Reportable Under Any Other Schedule**

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 .....				
<b>5 Total</b> – If alternate valuation was elected, enter the total of column D on Form ET-90, page 2, line 28; otherwise, enter the total of column E .....				<b>5</b>

**Schedule G – Transfers During Decedent’s Life**

A Item Number	B Description	C Alternate Valuation Date	D Alternate Value	E Value at Date of Death
1	New York gift tax paid ( <i>under Article 26A</i> ) by the decedent or decedent's estate for all gifts made by the decedent or decedent's spouse within three years before the decedent's death ( <i>section 954(c) - see instructions</i> )			
2	Transfers made by decedent ( <i>under section 1009 of Article 26A</i> ) in accordance with provisions of IRC sections 2035(a), 2036, 2037 or 2038			
Total from additional sheet(s) attached to this schedule .....				
<b>6 Total</b> – If alternate valuation was elected, enter the total of column D on Form ET-90, page 2, line 29; otherwise, enter the total of column E .....				<b>6</b>