

Transfer Inheritance Tax
PO Box 249
Trenton, NJ 08695-0249

STATE OF NEW JERSEY
Resident Decedent
ESTATE TAX RETURN 2017
(Instructions on reverse side)

(68) For Division Use Only

THIS FORM TO BE USED FOR DECEDENTS WITH DATES OF DEATH ON OR AFTER JANUARY 1, 2017, BUT BEFORE JANUARY 1, 2018

Decedent's Name	<u>Jones</u>	<u>Rebecca</u>	Decedent's S.S. No.	<u>456-78-9010</u>
	(Last)	(First)	(Middle)	
Date of Death (mm/dd/yy)	<u>01/10/17</u>	County of Residence	<u>Morris</u>	Testate <input checked="" type="checkbox"/> Intestate <input type="checkbox"/>
Mailing Address to send all correspondence*	Name <u>Max Jones</u>	Daytime Phone	<u>(973) 789-4560</u>	
	Street <u>35 Pinnacle Point</u>			
	City <u>Randolph</u>	State <u>NJ</u>	Zip Code <u>07869</u>	

*See Instructions

1. GROSS ESTATE: Enter the Total gross estate from Part 2 page 1 line 1 of the federal Form 706	1.	3,125,000
2. DEDUCTIONS: Enter deductions from Part 2 page 1 line 2 of the federal Form 706	2.	20,000
3. a. Tentative Taxable Estate: Subtract line 2 from line 1	3a.	3,105,000.00
b. State Death Tax Deduction for other states (See instructions)	3b.	11,250
c. Taxable Estate: Subtract line 3b from line 3a – Enter here and in NJ Estate Tax website calculator	3c.	3,093,750.00
4. Tentative New Jersey Estate Tax – enter amount calculated from the NJ Estate Tax website calculator (See Note to Line 4 in Instructions)	4.	83,318.02
5. Credit for New Jersey Inheritance Tax Paid (DO NOT INCLUDE INTEREST OR PENALTY)	5.	0
6. Enter the portion of the tax attributable to property located outside of New Jersey from line 4 of Schedule E-3 attached	6.	6,665.44
7. Total Credits – Add lines 5 & 6 and enter here	7.	6,665.44
8. Net New Jersey Estate Tax Due – line 4 minus line 7 (if less than zero, enter zero)	8.	76,652.58
9. Interest and Penalty Due (See instructions)	9.	
10. Total Amount Due – Add lines 8 and 9	10.	76,652.58
11. Payment on Account (if any)	11.	
12. If line 11 is LESS THAN Line 10, subtract line 11 from line 10 enter BALANCE DUE – PAY THIS AMOUNT WITH FORM ET-PMT	12.	76,652.58
13. If line 11 is MORE THAN line 10, subtract line 10 from line 11 ENTER REFUND AMOUNT**	13.	0.00

You must include a completed Federal form 706 even if you are not required to file with the IRS. Include a complete, legible copy of decedent's Last Will and Testament and all codicils thereto. Include a complete, legible copy of any trust agreements to which the decedent was a party.

****All applications for the refund of an overpayment in addition to the amount requested on line 13 of this return, must be made in writing within the three-year statutory period in accordance with and in the manner set forth in R.S. 54:38.3. (See Instructions for further information.)**

Affiant declares, under penalty of perjury:

I have examined this return and all accompanying documents and to the best of my knowledge and belief, it is true, correct and complete. I hereby authorize the party(s) set forth above to act as the estate's representative, to receive confidential information, and to make presentations on behalf of the estate.

Subscribed and sworn before me

this _____ day of _____, _____.

Signature: _____
(Executor – Administrator – Heir-at-law)

Print Name: Max Jones

Official Title: _____

Address: 35 Pinnacle Point
Randolph, New Jersey 07869

DECEDENT'S NAME	DECEDENT'S SOCIAL SECURITY NUMBER
Jones Rebecca	456-78-9010

SCHEDULE E-3 Credit for portion of tax attributable to property located outside New Jersey.

In general, intangible personal property is considered to be located in New Jersey regardless of where it may actually be located.

1. Gross value of property located outside New Jersey included on line 1 of the first page of this return		1.	250,000
Property	Value		
20 Hemlock Drive, East Stroudsburg, Pennsylvania	250,000		
Use separate sheet if necessary			
2. New Jersey gross estate wherever located (amount listed on line 1 of the first page of this return) ..		2.	3,125,000.00
3. Tentative New Jersey Estate Tax (amount listed on line 4 of the first page of this return)		3.	83,318.02
4. Allowable credit (divide line 1 by line 2 and multiply by line 3). Enter here and on line 6 of the first page of this return.		4.	6,665.44

DECEDENT'S NAME	DECEDENT'S SOCIAL SECURITY NUMBER
Jones Rebecca	456-78-9010

SCHEDULE E-4 Must be completed with return

WAIVER REQUEST SCHEDULE NEW JERSEY REAL PROPERTY

Note: All items on this schedule must be reported on the Form 706

List all NEW JERSEY REAL PROPERTY in which the decedent held an interest.

- Report fractional shares **only** if the property was held as tenants-in-common.
- Do not report property held as tenants-by-the-entirety if spouse/civil union partner is surviving.
- Tax waivers will not be issued for assets not listed on this schedule.

1. Decedent's Share 100%

County Morris

Street and Number 35 Pinnacle Point

Municipality: Randolph

Lot: 119.31

Block: 208

Title/Owner(s) of Record: Rebecca Jones

2. Decedent's Share

County

Street and Number

Municipality:

Lot:

Block:

Title/Owner(s) of Record:

3. Decedent's Share

County

Street and Number

Municipality:

Lot:

Block:

Title/Owner(s) of Record:

(If additional space is required, attach riders of the same size. All forms may be reproduced.)

DECEDENT'S NAME	DECEDENT'S SOCIAL SECURITY NUMBER
Jones Rebecca	456-78-9010

SCHEDULE E-6 Must be completed with return

WAIVER REQUEST SCHEDULE **NEW JERSEY STOCK ONLY**

Note: All items on this schedule must be reported on the Form 706

List ONLY stock incorporated in the State of New Jersey on which decedent's name is listed.

- (A) Report the number of shares owned of each stock.
- (B) List the name of the company and (C) all names registered on each stock.
- Tax waivers will not be issued for assets not listed on this schedule.

Stocks held in a Brokerage Account should not be listed on this schedule – include them in Account Total on Schedule E-5.

(A) Number of Shares	(B) Name of Stock	(C) Registered Names

DECEDENT'S NAME	DECEDENT'S SOCIAL SECURITY NUMBER
Jones Rebecca	456-78-9010

SCHEDULE E-7 Must be completed with return

WAIVER REQUEST SCHEDULE NEW JERSEY MUNICIPAL & CORPORATE BONDS

Note: All items on this schedule must be reported on the Form 706

List all NEW JERSEY investment bonds on which decedent's name is registered.

- Provide name of company or entity holding bond and all terms of bond.
- List all names registered on bond.
- Tax waivers will not be issued for assets not listed on this schedule.

Bonds held in a Brokerage Account should not be reported on this schedule – include them in Account Total on Schedule E-5.

(A) Par Value	(B) Investment Bonds – Individually or Jointly Owned	(C) Registered Name(s)

(If additional space is required, attach riders of the same size. All forms may be reproduced.)