

**Federal Estate Tax Affidavit
New York State Estate Tax Affidavit**

Title No.

Premises:

STATE OF
COUNTY OF) SS.

, being duly sworn deposes and says:

I reside at .

I am the (Executor-Administrator)* of the Estate of who died a resident of
County on , .

(*If neither of the above, state relationship to decedent)

I am fully familiar with the assets of which the decedent died seized. The value of the decedent's gross Federal estate, as defined by the Internal Revenue Code, is less than \$, and therefore the decedent's estate is not subject to Federal Estate Tax or New York State Estate Tax. (Delete reference to New York State Estate Tax if amount is greater than exempt amount set forth on the Notes on next page.)

I make this statement knowing full well that the Title Insurance Company and are relying on the truth of the statements herein for the purposes of issuing its policy of title in the captioned matter.

Sworn to before me this
day of , 20 .

SEE NOTES ON NEXT PAGE

NOTES:

1. The above affidavit may be used to pass the question of the Federal Estate Tax Lien of a decedent where the gross estate is less than the amount set forth below for the date of the decedent's death.
 - \$600,000, if the decedent died prior to 1998
 - \$625,000, if the decedent died during 1998
 - \$650,000, if the decedent died during 1999
 - \$675,000, if the decedent died during 2000 or 2001
 - \$1,000,000, if the decedent died during 2002 or 2003
 - \$1,500,000, if the decedent died during 2004 or 2005
 - \$2,000,000, if the decedent died during 2006, 2007, or 2008
 - \$3,500,000 if the decedent died during 2009
 - (No federal estate tax imposed for persons dying in 2010)
 - \$1,000,000, if the decedent died in 2011 or thereafter
2. The above affidavit may be used to pass the question of the New York Estate Tax Lien of a decedent where the gross estate is less than the amount set forth below for the date of the decedent's death.
 - \$108,333, if decedent died on or prior to 6/09/94
 - \$115,000, if decedent died on or after 6/10/94 and on or prior to 9/30/98
 - \$300,000, if decedent died on or after 10/01/98 and on or prior to 1/31/2000
 - \$675,000, if decedent died on or after 2/01/2000 and on or prior to 12/31/2001
 - \$1,000,000, if decedent died during 2002 and thereafter
3. The gross estate as used in the above affidavit includes, but is not limited to, wheresoever situate, all real estate, stocks and bonds, mortgages, notes and cash, insurance on decedent's life, jointly owned property, Totten Trusts, powers of appointment, annuities, personal property, interests in partnerships, unincorporated businesses, limited liability companies, and corporations.