

14.0 INSURANCE ON LIFE OF OTHERS

14.01 Did D own an interest in a policy insuring the life of someone else (including a community interest in a policy insuring D's spouse)? ☐ Yes ☐ No If no, skip the rest of this Section 14.0. If yes, complete Items 14.02 through 14.06 for each life insurance agent who is not listed at Item 13.05 and who is responsible for such policies.

14.02 Name _____

14.03 Address _____

14.04 City, state, zip _____

14.05 Phone number _____

14.05A Fax number _____

14.05B Email _____

14.06 Company represented _____

Complete the remainder of this section for each policy on the life of someone other than D in which D owned an interest, and attach a separate page for each insurance policy.

Do not reduce the indicated asset value by 1/2 when D's interest was a 1/2 community interest, but use the full amounts shown on IRS Form 712.

14.07 Company _____

14.08 Address _____

14.09 City, state, zip _____

14.10 Type or kind of policy _____

14.11 Policy number _____

14.12 Insured's name _____

14.13 Address _____

14.14 City, state, zip _____

14.15 Relationship to D _____

14.16 Interpolated terminal reserve value on date of D's death (from IRS Form 712) _____

14.17 Amount of last premium paid _____

14.18 Date of payment of last premium _____

14.19 Proportionate part of last premium _____

14.20 Total value (Item 14.16 plus Item 14.19) _____

14.21 Ownership: ☐ Separate ☐ Community

14.22 If D's separate property, was this asset ever held as community property by D and D's surviving spouse?

☐ Yes ☐ No If yes, explain _____

14.23 Is ownership to be changed? ☐ Yes ☐ No

14.24 If yes, to whom? _____

14.25 Address _____

14.26 City, state, zip _____

14.27 Social Security number _____

14.28 Did D own any insurance on the life of another that is not included in D's gross estate? ☐ Yes ☐ No
If yes, give details _____

14.29 Was this policy specifically bequeathed? ☐ Yes ☐ No If yes, give details, including cross-reference
to the specific provision in D's will _____

14.30 Was this policy collateral for any loan owed or guaranteed by D? ☐ Yes ☐ No If yes, give details

14.31 D's income tax basis _____

14.32 Did D make a gift of this policy within three years of D's death? ☐ Yes ☐ No If yes, give details

14.33 - 14.34 (Reserved)

Inventory and Estate Tax Return Description

14.35 Enter policy description (in format to be used on probate documents or estate tax return) and indicate its
value on the date of death and on the alternate valuation date _____
