

**4.0 SAFE DEPOSIT BOX**

- 4.01 Did D maintain or have access to one or more safe deposit boxes, either alone or with another person?  
 Yes  No If no, skip the rest of this Section 4.0. If yes, complete Items 4.02 through 4.14 with respect to each safe deposit box.
  
- 4.02 Name of institution \_\_\_\_\_
- 4.03 Address \_\_\_\_\_
- 4.04 City, state, zip \_\_\_\_\_
- 4.05 Phone number \_\_\_\_\_
- 4.06 Officer to contact \_\_\_\_\_
- 4.07 Box number \_\_\_\_\_
- 4.08 Name of joint holder/depositor \_\_\_\_\_
- 4.09 Address of joint holder/depositor \_\_\_\_\_
- 4.10 City, state, zip \_\_\_\_\_
- 4.11 Phone number \_\_\_\_\_
- 4.11A Fax number \_\_\_\_\_
- 4.11B E-mail \_\_\_\_\_
- 4.12 Relationship to D \_\_\_\_\_
- 4.13 Court order needed for entry?  Yes  No If no, skip to Item 4.19. If yes, complete Items 4.14 through 4.18B.
- 4.14 Contents of box \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
- 4.15 Name of person filing motion to open safe deposit box \_\_\_\_\_
- 4.16 Address \_\_\_\_\_
- 4.17 City, state, zip \_\_\_\_\_
- 4.18 Phone number \_\_\_\_\_
- 4.18A Fax number \_\_\_\_\_
- 4.18B E-mail \_\_\_\_\_
- 4.19 Has inventory of box been made?  Yes  No
- 4.20 When copy of inventory has been obtained, check here

4.21 If any of the contents did not belong to D or if they will not be included in D's federal estate tax return, explain \_\_\_\_\_

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