

13.0 INSURANCE ON D'S LIFE

13.01 Was there any insurance on D's life, including accidental death benefits from credit card companies?
 Yes No If no, skip the rest of this Section 13.0. If yes, complete all items in this section for each policy. Attach separate pages for each additional policy.

13.02 Was any insurance payable to D's estate? Yes No

13.03 Was any insurance payable to a named beneficiary? Yes No

13.03A Did this beneficiary survive D by 120 hours? Yes No

13.04 (Reserved)

Complete Items 13.05 through 13.09 for each of D's life insurance agents.

13.05 Name _____

13.06 Address _____

13.07 City, state, zip _____

13.08 Phone number _____

13.08A Fax number _____

13.08B E-mail _____

13.09 Company represented _____

Complete the remainder of this section for each policy payable by virtue of D's death.

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.

13.10 Company _____

13.11 Address _____

13.12 City, state, zip _____

13.13 Type or kind of policy _____

13.14 Policy number _____

13.15 Face amount _____

13.15A Cash surrender value immediately before D's death _____

Policy Loans:

13.16 Principal _____

13.17 Interest to date of death _____

13.18 Total of principal and interest _____

Net proceeds:

- 13.19 Accumulated dividends _____
- 13.20 Postmortem dividends _____
- 13.21 Returned premiums _____
- 13.22 Amount of proceeds if payable in one sum _____
- 13.23 Value of proceeds as of date of death (if not payable in one sum) _____
- 13.24 Net proceeds after all increases and deductions _____
- 13.25 Primary beneficiary name _____
- 13.26 Dear _____
- 13.27 Address _____
- 13.28 City, state, zip _____
- 13.28A Phone number _____
- 13.28B Fax number _____
- 13.28C E-mail _____
- 13.29 Social Security number _____
- 13.30 Date of birth _____
- 13.31 Relationship to D _____
- 13.32 Contingent beneficiary name _____
- 13.33 Dear _____
- 13.34 Address _____
- 13.35 City, state, zip _____
- 13.36 Social Security number _____
- 13.37 Date of birth _____
- 13.38 Relationship to D _____
- 13.39 Policy sent for payment by others? Yes No
- 13.40 Policy to be sent by us for payment? Yes No
- 13.41 IRS Form 712 already requested? Yes No
- 13.42 IRS Form 712 received? Yes No
- 13.43 Benefits already paid? Yes No
- 13.44 Owner of policy if not D _____
- 13.45 Address _____

- 13.46 City, state, zip _____
- 13.47 Relationship to D _____
- 13.48 Name of applicant for policy _____
- 13.49 Ownership: Separate Community
- 13.50 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 _____

- 13.51 Include in inventory? Yes No
- 13.52 Exclude value from D's taxable estate? Yes No
- 13.53 If to be excluded, give details _____

- 13.54 Date of purchase or issue of policy _____
- 13.55 Date policy was assigned by D, if applicable _____
- 13.56 Interpolated terminal reserve value on date of assignment from IRS Form 712 _____
- 13.57 Did D make a gift of this policy within three years of D's death? Yes No If yes, give details

- 13.58 Did D pay any premiums on this policy within three years of D's death? Yes No If yes, give amounts and dates paid _____

- 13.59 (Reserved)

Installment payment of proceeds:

- 13.60 Is policy payable in deferred payments or in installments? Yes No If no, skip to Item 13.71. If yes, complete Items 13.61 through 13.70.
- 13.61 Amount of installments _____
- 13.62 Are payments measured by life of another, either as to term or amount? Yes No If no, skip to Item 13.68. If yes, complete Items 13.63 through 13.67.
- 13.63 Name of that person _____
- 13.64 Address _____
- 13.65 City, state, zip _____
- 13.66 Date of birth _____

13.67 Social Security number _____

13.68 Amount applied by the insurance company as a single premium representing the purchase of installment benefits _____

13.69 Basis used by insurer in valuing installment benefits (mortality table and rate of interest) _____

13.70 Was the insured the annuitant or beneficiary of any annuity contract issued by *this* company? Yes No If yes, give details _____

13.71 Was this policy collateral for any debt owed or guaranteed by D? Yes No If yes, give details _____

13.72 D's income tax basis in this policy _____

13.73 - 13.79 (Reserved)

Inventory and Estate Tax Return Description

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