

**8.0 U.S. GOVERNMENT SAVINGS BONDS**

- 8.01 Did D own any U.S. Government Savings Bonds (Series E, F, G, H, J, K, EE, and HH)? ☐ Yes ☐ No  
If no, skip the rest of this Section 8.0. If yes, determine the following for each series bond and attach a separate page for each additional series bond:

**Do not reduce the indicated asset value by 1/2 when D's interest was a 1/2 community interest, but use entire value of the bond.**

- 8.02 Series \_\_\_\_\_
- 8.03 Date of issue \_\_\_\_\_
- 8.04 Denomination of bond \_\_\_\_\_
- 8.05 Bond number(s) \_\_\_\_\_  
\_\_\_\_\_
- 8.06 Registration \_\_\_\_\_
- 8.07 Ownership: ☐ Separate ☐ Community
- 8.08 If separate property, was this asset ever held as community property by D and D's surviving spouse?  
☐ Yes ☐ No If yes, explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**When determined, complete the following summary for each denomination:**

- 8.09 Number of bonds of this denomination \_\_\_\_\_
- 8.10 Total redemption value \_\_\_\_\_
- 8.11 Total initial cost for this denomination \_\_\_\_\_
- 8.12 Accrued interest (Item 8.10 minus Item 8.11) \_\_\_\_\_
- 8.13 If any bonds are registered in **joint tenancy with right of survivorship**, complete the following for each surviving joint tenant:

*Note:* If these bonds were the community property of D and D's spouse or they were the sole joint tenants, these bonds should be reported in Part I of Schedule E of D's estate tax return. All other jointly held bonds should be reported in Part II of Schedule E of D's estate tax return.

Name \_\_\_\_\_

Address \_\_\_\_\_

City, state, zip \_\_\_\_\_

Phone number \_\_\_\_\_

Social Security number \_\_\_\_\_

Relationship to D \_\_\_\_\_

Contribution of the nonspouse survivor toward acquisition of each bond: Amount \_\_\_\_\_

Percentage of total value \_\_\_\_\_

8.14 - 8.19 (Reserved)

8.20 Are bonds to be redeemed? ☐ Yes ☐ No

8.21 Were any of these bonds specifically bequeathed? ☐ Yes ☐ No If yes, give details, including cross-reference to the specific provision in D's will \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8.22 Are bonds to be transferred? ☐ Yes ☐ No If yes, complete name, address, and Social Security number of transferee and describe bonds to be transferred \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8.23 - 8.24 (Reserved)

#### **Inventory and Estate Tax Return Description**

8.25 Enter asset description (in the 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 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8.26 D's income tax basis in those bonds \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_