

**18.0 PERSONAL, HOUSEHOLD, AND MISCELLANEOUS ASSETS**

18.01 Did D own any personal, household, artistic, collectible, or miscellaneous assets that are individually scheduled on insurance policies or the total value of which is in excess of \$3,000, or any collections whose artistic or collectible value combined is in excess of \$10,000?  Yes  No

If yes, complete Items 18.10 through 18.225.

If no, consider describing those items that D owned as “household goods, furniture, furnishings, clothing, and miscellaneous personal property” in Item 18.02 and/or complete Items 18.03 through 18.09. Complete Items 18.27, 18.47, 18.67, 18.87, 18.107, 18.127, 18.147, and 18.148.

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

18.02 General description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.03 Ownership:  Separate  Community

18.04 Value at death of D’s interest \_\_\_\_\_

18.05 Alternate value of D’s interest \_\_\_\_\_

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

18.07 Were any of these items collateral for any loan owed or guaranteed by D?  Yes  No If yes, give details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.08 D’s income tax basis \_\_\_\_\_

**Inventory and Estate Tax Return Description**

18.09 Enter description (in format to be used on probate documents or estate tax return) and indicate value on the date of death and on the alternate valuation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Jewelry**

18.10 Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.11 Present location \_\_\_\_\_

18.12 Ownership:     Separate    Community    Separate property of D’s spouse

18.13 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 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.14 Value at death \_\_\_\_\_

18.15 Alternate value \_\_\_\_\_

18.16 Insured value \_\_\_\_\_

18.17 Insurance company \_\_\_\_\_

18.18 Insurance policy number \_\_\_\_\_

18.19 Insurance agent \_\_\_\_\_

18.20 Address \_\_\_\_\_

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

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

18.23 Fax number \_\_\_\_\_

18.24 E-mail \_\_\_\_\_

18.25 Policy coverage \_\_\_\_\_

18.26 D’s income tax basis \_\_\_\_\_

18.27 Were any items of jewelry specifically bequeathed?    Yes    No   If yes, give details, including cross-reference to the specific provision in D’s will \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.28 - 18.29 (Reserved)

**Furs**

18.30 Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.31 Present location \_\_\_\_\_

18.32 Ownership:     Separate    Community    Separate property of D’s spouse

18.33 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.34 Value at death \_\_\_\_\_

18.35 Alternate value \_\_\_\_\_

18.36 Insured value \_\_\_\_\_

18.37 Insurance company \_\_\_\_\_

18.38 Insurance policy number \_\_\_\_\_

18.39 Insurance agent \_\_\_\_\_

18.40 Address \_\_\_\_\_

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

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

18.43 Fax number \_\_\_\_\_

18.44 E-mail \_\_\_\_\_

18.45 Policy coverage \_\_\_\_\_

18.46 D’s income tax basis \_\_\_\_\_

18.47 Were any items of furs specifically bequeathed?    Yes    No   If yes, give details, including cross-  
reference to the specific provision in D’s will \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.48 - 18.49 (Reserved)

**Stamp, Coin, or Other Collection**

18.50 Description \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.51 Present location \_\_\_\_\_

18.52 Ownership:     Separate    Community    Separate property of D’s spouse

18.53 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.54 Value at death \_\_\_\_\_

18.55 Alternate value \_\_\_\_\_

18.56 Insured value \_\_\_\_\_

18.57 Insurance company \_\_\_\_\_

18.58 Insurance policy number \_\_\_\_\_

18.59 Insurance agent \_\_\_\_\_

18.60 Address \_\_\_\_\_

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

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

18.63 Fax number \_\_\_\_\_

18.64 E-mail \_\_\_\_\_

18.65 Policy coverage \_\_\_\_\_

18.66 D’s income tax basis \_\_\_\_\_

18.67 Were any collections specifically bequeathed?  Yes  No If yes, give details, including cross-ref-  
erence to the specific provision in D’s will \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.68 - 18.69 (Reserved)

**Works of Art**

18.70 Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.71 Present location \_\_\_\_\_

18.72 Ownership:  Separate  Community  Separate property of D’s spouse

18.73 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.74 Value at death \_\_\_\_\_

18.75 Alternate value \_\_\_\_\_

18.76 Insured value \_\_\_\_\_

18.77 Insurance company \_\_\_\_\_

18.78 Insurance policy number \_\_\_\_\_

18.79 Insurance agent \_\_\_\_\_

18.80 Address \_\_\_\_\_

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

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

18.83 Fax number \_\_\_\_\_

18.84 E-mail \_\_\_\_\_

18.85 Policy coverage \_\_\_\_\_

18.86 D's income tax basis \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

18.88 - 18.89 (Reserved)

**Rare Books**

18.90 Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.91 Present location \_\_\_\_\_

18.92 Ownership:  Separate  Community  Separate property of D's spouse

18.93 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.94 Value at death \_\_\_\_\_

18.95 Alternate value \_\_\_\_\_

18.96 Insured value \_\_\_\_\_

18.97 Insurance company \_\_\_\_\_

18.98 Insurance policy number \_\_\_\_\_

18.99 Insurance agent \_\_\_\_\_

18.100 Address \_\_\_\_\_

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

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

18.103 Fax number \_\_\_\_\_

18.104 E-mail \_\_\_\_\_

18.105 Policy coverage \_\_\_\_\_

18.106 D's income tax basis \_\_\_\_\_

18.107 Were any rare books specifically bequeathed?  Yes  No If yes, give details, including cross-reference to the specific provision in D's will \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.108 - 18.109 (Reserved)

**Valuable Antiques**

18.110 Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.111 Present location \_\_\_\_\_

18.112 Ownership:  Separate  Community  Separate property of D's spouse

18.113 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.114 Value at death \_\_\_\_\_

18.115 Alternate value \_\_\_\_\_

18.116 Insured value \_\_\_\_\_

18.117 Insurance company \_\_\_\_\_

18.118 Insurance policy number \_\_\_\_\_

18.119 Insurance agent \_\_\_\_\_

18.120 Address \_\_\_\_\_

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

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

18.123 Fax number \_\_\_\_\_

18.124 E-mail \_\_\_\_\_

18.125 Policy coverage \_\_\_\_\_

18.126 D's income tax basis \_\_\_\_\_

18.127 Were any valuable antiques specifically bequeathed?  Yes  No If yes, give details, including cross-reference to the specific provision in D's will \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.128 - 18.129 (Reserved)

**Furnishings**

18.130 Description \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.131 Present location \_\_\_\_\_

18.132 Ownership:  Separate  Community  Separate property of D's spouse

18.133 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.134 Value at death \_\_\_\_\_

18.135 Alternate value \_\_\_\_\_

18.136 Insured value \_\_\_\_\_

18.137 Insurance company \_\_\_\_\_

18.138 Insurance policy number \_\_\_\_\_

18.139 Insurance agent \_\_\_\_\_

18.140 Address \_\_\_\_\_

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

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

18.143 Fax number \_\_\_\_\_

18.144 E-mail \_\_\_\_\_

18.145 Policy coverage \_\_\_\_\_

18.146 D’s income tax basis \_\_\_\_\_

18.147 Were any furnishings specifically bequeathed?  Yes  No If yes, give details, including cross-reference to the specific provision in D’s will \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

18.148 Were any of the assets listed at Items 18.10 through 18.147 collateral for any loan owed or guaranteed by D?  Yes  No If yes, give details \_\_\_\_\_

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\_\_\_\_\_

18.149 (Reserved)

**Digital Assets**

18.150 Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

18.151 Username or account number (used by custodian to identify account) \_\_\_\_\_

18.152 Password (used by D to access account) \_\_\_\_\_

18.153 URL (website hosting account) \_\_\_\_\_

18.154 User e-mail (address used by custodian for account communications) \_\_\_\_\_

18.155 Challenge questions and answers (to authenticate password reset requests) \_\_\_\_\_

\_\_\_\_\_

18.156 Ownership:  Separate  Community  Separate property of D’s spouse

18.157 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 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

18.158 Value at death \_\_\_\_\_

18.159 Alternate value \_\_\_\_\_

18.160 Insured value \_\_\_\_\_

18.161 Insurance company \_\_\_\_\_

18.162 Insurance policy number \_\_\_\_\_

18.163 Insurance agent \_\_\_\_\_

18.164 Address \_\_\_\_\_



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

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

18.167 Fax number \_\_\_\_\_

18.168 E-mail \_\_\_\_\_

18.169 Policy coverage \_\_\_\_\_

18.170 Custodian \_\_\_\_\_

18.171 Address \_\_\_\_\_

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

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

18.174 Fax number \_\_\_\_\_

18.175 E-mail \_\_\_\_\_

18.176 Were any digital assets specifically bequeathed?  Yes  No If yes, give details, including cross-reference to the specific provision in D’s will \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.177 Did D consent to disclosure of the content of an electronic communication of the user?  Yes  No If yes, give details, including cross-reference to the specific provision in D’s will, if applicable \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.178 Did a court direct disclosure of the content of an electronic communication of the user?  Yes  No If yes, give details, including the court, cause number, jurisdiction, and date of the order \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

18.179 Did D prohibit disclosure of digital assets of the user?  Yes  No

18.180 - 18.189 (Reserved)

**Inventory and Estate Tax Return Description**

18.190 Enter description (in format to be used on probate documents or estate tax return) of any **jewelry, furs, stamp collection, coin collection, other collection, works of art, rare books, valuable antiques, and furnishings**, and beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.191 Enter description (in format to be used on probate documents or estate tax return) of the items of **farm or other equipment** owned by D at the date of D’s death, including make, model, serial number, year of manufacture, additional related equipment, liens thereon, and the name and address of the lienholder. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_

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18.192 Enter description (in format to be used on probate documents or estate tax return) of the kind and quantity of **livestock** (breed, age, condition, size, and whether used for food, breeding, or recreation) owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date

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18.193 Enter description (in format to be used on probate documents or estate tax return) of the nature and quantity of D’s **agricultural crops** growing or harvested and stored at the time of D’s death. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.194 Enter description (in format to be used on probate documents or estate tax return) of any **gold, silver, or foreign currencies** owned by D. In addition, beside each item indicate its value on the date of death and

on the alternate valuation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.195 Enter description (in format to be used on probate documents or estate tax return) of any **pending tort claims** in which D was or would have been plaintiff (style of case, docket number, court in which pending, etc.) at the time of D's death \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.196 Enter description (in format to be used on probate documents or estate tax return) of any **other pending claims** in which D was or would have been plaintiff (style of case, docket number, court in which pending, etc.) at the time of D's death \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.197 Enter description (in format to be used on probate documents or estate tax return) of any **income tax refunds** due at the time of D's death. In addition, beside each item indicate the amount of the refund (see Items 12.51 through 12.54) \_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

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18.198 Enter description (in format to be used on probate documents or estate tax return) of any **trademarks** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.199 Enter description (in format to be used on probate documents or estate tax return) of any **patents** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.200 Enter description (in format to be used on probate documents or estate tax return) of any **copyrights** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.201 Enter description (in format to be used on probate documents or estate tax return) of any **royalties other than minerals** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.202 Enter description (in format to be used on probate documents or estate tax return) of any **franchises** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.203 Enter description (in format to be used on probate documents or estate tax return) of any **contract rights** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.204 Enter description (in format to be used on probate documents or estate tax return) of any **memberships in clubs, lodges, and fraternal and professional organizations** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_

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18.205 Enter description (in format to be used on probate documents or estate tax return) of any **rice allotments** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate val-

uation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.206 Enter description (in format to be used on probate documents or estate tax return) of any interest D owned in the **estate of another decedent**. In addition, give name and address of the executor of that estate, description of assets, and the value on date of death and on the alternate valuation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.207 Enter description (in format to be used on probate documents or estate tax return) of any **frequent flyer** or other frequent patron program in which D participated. In addition, indicate the value of each on the date of death and on the alternate valuation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18.208 - 18.209 (Reserved)

18.210 Enter description (in format to be used on probate documents or estate tax return) of any **assets not otherwise described** owned by D. In addition, beside each item indicate its value on the date of death and on the alternate valuation date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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18.211 Were any of the assets listed at Items 18.191 through 18.210 collateral for any loan owed or guaranteed by D?  Yes  No If yes, give details \_\_\_\_\_

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18.212 - 18.219 (Reserved)

18.220 Did D’s surviving spouse own any income-producing separate property?  Yes  No If yes, determine if **income from surviving spouse’s separate property** is community property, and if so, calculate amount of dividends, interest, rents, and royalties from each item accrued as of D’s death and enter description (in format to be used on probate documents or estate tax return) \_\_\_\_\_

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18.221 Did D’s separate estate have a **claim for reimbursement against the community estate** of D and D’s surviving spouse?  Yes  No If yes, give details and enter description (in format to be used on probate documents or estate tax return) \_\_\_\_\_

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18.222 Did the community estate of D and D’s spouse have a **claim for reimbursement against the separate estate of D’s surviving spouse**?  Yes  No If yes, give details and enter description (in format to be used on probate documents or estate tax return) \_\_\_\_\_

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18.223 Did D’s separate estate have a **claim for reimbursement against the separate estate of D’s spouse**?  Yes  No If yes, give details and enter description (in format to be used on probate documents or estate tax return) \_\_\_\_\_

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18.224 (Reserved)

18.225 Were any of the assets or claims listed in Items 18.191 through 18.223 specifically bequeathed?  Yes  No If yes, give details, including cross-reference to the specific provision in D’s will \_\_\_\_\_

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