

2024 706 Forms and Schedules

Form/Schedule

Federal

Form 4768: Application for Extension of Time to File a Return and/or Pay US Estate (and Generation-Skipping Transfer) Taxes

Form 706: US Estate (and Generation-skipping transfer) Tax Return

Form 706-NA: US Estate Tax Return for Nonresident

Form 8822: Change of Address

Schedule A: Real Estate

Schedule A-1 (pp. 1-4): Sec. 2032A valuation

Schedule B: Stocks and Bonds

Schedule C: Mortgages, Notes, and Cash

Schedule D: Insurance on the Decedent's Life

Schedule E: Jointly Owned Property

Schedule F: Other Misc. Property not Reportable

Schedule G: Transfers During Decedent's Life

Schedule H: Powers of Appointment

Schedule I: Annuities

Schedule J: Funeral Expense & Expense Incurred in Administering Property Subject to Claims

Schedule K: Debts of the Decedent, and Mortgages and Liens

Schedule L: Net Losses During Administration and Expense Incurred in Administering Property Not Subject to Claims

Schedule M: Bequests, Etc., to Surviving Spouse

Schedule O: Charitable, Public, and Similar Gifts and Bequests

Schedule P: Credit for Foreign Death Taxes

2024 706 Forms and Schedules

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Schedule PC: Protective Claim for Refund

Schedule Q: Credit for Tax on Prior Transfers

Schedule R (page 1, 2 & 3): Generation-Skipping Transfer Tax

Schedule R-1: Generation-Skipping Transfer Tax

Schedule U: Qualified Conservation Easement Exclusion

Footnotes

Whitepaper detail for schedules

Connecticut

Form CT-4422 UGE

Form CT-706/709

Form CT-706/709 EXT

Form CT-792 UGE

New Jersey

Form ET-PMT

Form IT-EP

Form IT-ESTATE

Form IT-EXT

Form IT-R

Schedule A

Schedule B

Schedule B1

Schedule C

2024 706 Forms and Schedules

Form/Schedule

Schedule D
Schedule E
New York
Form ET-130
Form ET-133
Form ET-14
Form ET-141
Form ET-706