

Federal

(Jurisdiction must be activated and released for forms/schedules to print)

Form/Schedule

Requirement(s) to Print

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

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

Connecticut

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Form/Schedule	Requirement(s) to Print
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Form CT-4422 UGE

Form CT-706/709

Form CT-706/709 EXT

Form CT-792 UGE

New Jersey

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Form ET-PMT

Form IT-EP

Form IT-ESTATE

Form IT-EXT

Form IT-R

Schedule A

Schedule B

Schedule B1

Schedule C

Schedule D

Schedule E

New York

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Form/Schedule

Requirement(s) to Print

Form ET-130

Form ET-133

Form ET-14

Form ET-141

Form ET-706