

# FEDERAL ESTATE TAX AFFIDAVIT

TITLE CO.:

TITLE NO.:

DATE:

STATE OF

)  
)SS.:

COUNTY OF

)

being duly sworn, depose(s) and say(s):

1. I reside at \_\_\_\_\_ and am the  
(Executor-Administrator-Specify other relationship) of the Estate of \_\_\_\_\_ who  
died a resident of \_\_\_\_\_ County on \_\_\_\_\_ .

2. I am fully familiar with the assets of which the decedent died seized, including \_\_\_\_\_  
(the "Premises"),  
which comprise the gross estate as hereinafter defined, and the said gross estate (includes, wheresoever  
situate, all real estate, stocks and bonds, mortgages, notes and cash, insurance on decedent's life, jointly owned property,  
transfers during decedent's life without an adequate or full consideration, powers of appointment, annuities, personal  
property, interests in a partnership or unincorporated business and the value of the decedent's adjusted lifetime gifts) is less  
than \$ \_\_\_\_\_ and said estate is not subject to any Federal Estate Tax.

3. I make this statement knowing full well that \_\_\_\_\_ relies on  
the accuracy thereof for the purposes of issuing its policy of title insurance in the captioned matter.

Sworn to before me this \_\_\_\_\_ day  
of \_\_\_\_\_, \_\_\_\_\_ .

\_\_\_\_\_  
Notary Public

Year	Highest Estate & Gift Tax Rate	Amount Exempt from Estate Tax
2002	50%	\$1 million
2003	49%	\$1 million
2004	48%	\$1.5 million
2005	47%	\$1.5 million
2006	46%	\$2 million
2007	45%	\$2 million
2008	45%	\$2 million
2009	45%	\$3.5 million
2010	Top Individual Rate (for gift tax only)	Unlimited – Taxes Repealed