

ESTATE PLANNING & REVIEW SAMPLE

Base Facts in First Death Year (2053)

Prepared for John and Sarah Jones

IN ESTATE		OUT OF ESTATE	TOTAL TO HEIRS
<p>John's Estate Joint: \$13,593,582 Titled: \$3,840,289 Total: \$17,433,871</p>	<p>Taxes + Expenses (\$222,842)</p>	<p>Individual CD, 19-1 \$598,154</p>	<p>\$28,116,659</p>
<p>Transfer to Spouse: \$17,211,029</p>		<p>Individual CD, 55-1 \$451,509</p>	
<p>Sarah's Estate Titled: \$31,964,599 Total: \$31,964,599</p>	<p>Taxes + Expenses (\$4,897,603)</p>		
<p>IN ESTATE TRANSFER BREAKDOWN</p>			
<p>Gross: \$32,187,441 Taxes: \$5,120,445 Heirs: \$27,066,996</p>	<p>Transfer to Heirs (In Estate) \$27,066,996</p>	<p>Transfer to Heirs (Out of Estate) \$1,049,663</p>	

