

VINCENT J. RUSSO & ASSOCIATES, P.C.
2009 GIFT TAX RETURN QUESTIONNAIRE

Name and Address
of Donor(s): _____

Supervising Partner: Christopher M. Petillo, 516-683-1717, ext. 2155
Legal Assistant: Denise M. Ruddock, 631-582-1919, ext. 33
E-mail address: druddock@vjussolaw.com
Fax #: 631-582-8484

Social Security Number of Donor(s) _____

Column 1 DESCRIPTION OF GIFT	Column 2 Date of Gift	Column 3 Cost Basis of Gift	Column 4 Fair Market Value of Gift(s)	Column 5 Name and Address of Donee (recipient of gift)
Examples: a) House located at 250 Nassau Blvd. b) 4735.25 shares Janus Mercury Fund c) 100 shares IBM stock d) \$4,000 Cash		(cost of house plus improvements; cost of stock plus reinvested dividends) N/A if gift was cash)	(Ex: Appraised Value of home on 7/15/09; Value of IBM stock on 10/1/2009); Cash Value	my son, Arthur Fonzarelli, 123 Main Street, Westbury, NY 11590 Cunningham Family Trust Dated 10/1/2009

Did you transfer real property this year? YES NO. IF YES, please attach a copy of your appraisal or real estate broker valuation letter.
Have you previously filed Gift Tax returns? YES NO. If YES, attach copies of the prior returns (Federal & NYS) if we were not the preparers.

PLEASE SIGN BELOW:

For Office Use Only:

Matter No. _____