

VINCENT J. RUSSO & ASSOCIATES, P.C.
2007 GIFT TAX RETURN QUESTIONNAIRE

Name and Address
of Donor(s): _____

Supervising Partner: Frank L. Buquicchio, 631-582-1919, ext. 27
Tax Associate: Christopher M. Petillo, 516-682-8282, ext. 7501
Gift Tax Preparer: Shirley M. Diefenbach, 516-683-1717, ext. 2165
Legal Assistant: Denise M. Ruddock, 631-582-1919, ext. 33
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 7/15/07; Value of IBM stock on 10/1/2007); Cash Value | my son Arthur Fonzarelli, 123 Main Street, Westbury, NY 11590 Cunningham Family Trust Dated 10/1/2007 |
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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:

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| <p align="center">FOR OFFICE USE ONLY:</p> Date Received: _____ Matter #: _____ |
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