

RUSO LAW GROUP, P.C.

Estate Planning, Elder Law & Special Needs



Attorneys and Counselors at Law
 Garden City, New York
 Tel. (516) 683-1717 Fax (516) 683-9393
 www.vjrussolaw.com

Islandia, New York Lido Beach, New York New York, New York
 (631) 582-1919 (516) 897-7100 (800) 680-1717

By Appointment Only: Forest Hills | Patchogue | Southold

GIFT TAX RETURN QUESTIONNAIRE

Name and Address of Donor(s): _____ Social Security Number of Donor(s): _____

 Year: _____

| 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 1/3/14; Value of IBM stock on 11/2/2014); Cash Value | my son, Arthur Fonzarelli, 123 Main Street, Garden City, NY 11530 Cunningham Family Trust Dated 10/1/2012 |
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- Did you transfer real property this year? ~~YES~~ IF YES, did you purchase the property prior to 1977? ~~YES~~
 - Please attach a copy of your appraisal or real estate broker valuation letter.
- Have you previously filed Gift Tax returns? ~~YES~~ If YES, attach copies of the prior returns (Federal & NYS) if we were not the preparers.

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