

For office use only



New York State Resident Affidavit

For estates of decedents dying before May 26, 1990

(See TT-102-I for additional instructions)

For faster service check applicable box(es):

- Tax waivers required, Release of lien required, No tax letter, Tax paid letter

Mail the completed return to:

NYS Tax Department, TTTB - Estate Tax Audit - 855, W. A. Harriman Campus, Albany, NY 12227

Attach copy of death certificate. If Federal Form 706 has been filed for this estate, attach a copy.

Decedent's last name, First, Middle initial, Age at death, Decedent's county of residence, Date of death, Decedent's social security number

Name and address of attorney representing estate, Social security number, Telephone number

1 Applicant's name, 2 Applicant's relationship to decedent

3 Applicant's address

4 Decedent's occupation, 5 Name of employer

6 Decedent's residence at time of death, 7 Decedent's residence was: Owned, Rented, Other

- 8 Did decedent leave a will? 9 Do you elect to claim a marital deduction... 10 Do you intend to file an estate tax proceeding... 11 Do you intend to file a federal estate tax return... 12 Has an executor or administrator been appointed... 13 Have you made a careful and diligent search... 14 Did decedent have any interest in any business... 15 Did decedent hold any property in trust... 16 Did decedent, at time of death, have a safe deposit box...

Release of Safe Deposit Box

If a safe deposit is registered in the name of the decedent, individually or jointly with another person, Form AU-92, Application for Release of Safe Deposit Box, must be submitted.

- 17 Did decedent make any gifts or transfers valued at more than \$3,000 prior to January 1, 1983... 18 Did decedent make any gifts or transfers valued at more than \$10,000 after December 31, 1982... 19 Were gift tax returns filed?

Tax Computation

Table with 8 rows: 1 Taxable estate, 2 Adjusted taxable gifts, 3 Tentative tax base, 4 Estate tax on tentative tax base, 5 Unified credit, 6 Tax before credit for gift taxes paid, 7 New York gift tax payable, 8 New York net estate tax

* Tables A and B are contained in the Instructions, TT-102-I.

Privacy Notification - Our authority to require and maintain this personal information, including social security numbers, is found in section 171, subdivisions First and Fourteenth, subsection (a) of section 977 and subsection (c) of section 994 of the Tax Law.

Instructions: List in the schedule on pages 2 and 3 all assets of the decedent whether held individually, jointly or in trust for another person(s). If the decedent did not own a specific asset, write *none* in that particular schedule. Where additional space is needed to list an asset(s), attach a schedule of the asset(s) and enter the total amount in space provided in the appropriate schedule.

20 Qualified Jointly Owned Property - Qualified Joint Interests - Applicable for decedents dying after September 30, 1983. Interests held by the decedent and spouse as the only joint tenants.

A. Real Property - If a release of lien is desired for real property reported in this schedule, also enter the necessary information in Schedule III on page 4.

Full address - number, street, city, town, village, state	Assessed value at date of death	Market value at date of death	Balance of mortgage	Mortgage holder	Net value at date of death
Total A					

B. Other Jointly Owned Property - Other than real property

Name of bank, corporation or government agency issuing stocks and bonds	Number of shares of stocks or face value of bonds	Description of stocks or bonds, series of government bonds	Value at date of death
Total B			

20a Total of A and B **20a**

20b Amount includable in gross estate (1/2 of line 20a; enter here and on page 4, Recapitulation, line a) **20b**

21 Real Estate: If real property is held in joint names or as tenants in common, please indicate. If a release of lien is desired for real property reported in this schedule, also enter the necessary information in Schedule III on page 4.

Full address - number, street, city, town, village, state	Assessed value at date of death	Market value at date of death	Balance of mortgage	Mortgage holder	Net value at date of death
Total (enter here and on page 4, Recapitulation, line b)					21

22 Bank Deposits, Mortgage, Notes and Cash - If held jointly with another person or held in trust for another person, list name(s)

Description of assets or name and address of bank	Account number (if any)	Payable to (person or estate)	Value at date of death
Total (enter here and on page 4, Recapitulation, line c)			22

23 Stocks and Bonds - If held jointly with another person or if payable on death to some other person, list the beneficiaries. For stocks held in more than three corporations or where not regularly traded, a broker's letter may be required to substantiate the value of the stock at the date of death. Bonds may be grouped according to denomination and beneficiary. If additional space is needed, list totals here and attach a separate sheet.

Name of corporation or issuer of bonds	Payable to (person or estate)	Maturity date of bonds	Number of bonds or shares of stock	Face value of bonds	Market value at date of death
Total (enter here and on page 4, Recapitulation, line d)					23

24 Life Insurance Policies

Name of company	Policy number	Name of beneficiary (person or estate)	Amount
Total (enter here and on page 4, Recapitulation, line e)			24

25 Annuities, Retirement Benefits, Including IRA's and Keoghs, and Profit-Sharing Plans

Attach a statement from each company or fund.

Description of asset	Name of beneficiary (person or estate)	Value at date of death
Total (enter here and on page 4, Recapitulation, line f)		25

26 Other Miscellaneous Assets - Qualified terminable interest property, business interest, household furnishings, jewelry, automobiles, boats, etc.

Description of asset	Value at date of death	
Total (enter here and on page 4, Recapitulation, line g)		26

27 Certain Gifts or Transfers Made by Decedent During Lifetime (see instructions before completing this schedule)

Description of asset	Date of transfer	To whom transferred	Value at date of death
Total (enter here and on page 4, Recapitulation, line h)			27



Change in Mailing Address and Assistance Information for Certain Estate Tax Forms

On July 1, 2008, we changed processing centers. Any estate tax form that instructs you to mail the form to: NYS Estate Tax, Processing Center, PO Box 5556, New York NY 10087-5556, must be mailed to this address instead (see *Private delivery services* below):

**NYS ESTATE TAX
PROCESSING CENTER
PO BOX 15167
ALBANY NY 12212-5167**

Any estate tax form that instructs you to mail the form to: TTTB-Estate Tax Audit-855, TTTB-Estate Tax-855, Transaction and Transfer Tax Bureau-Estate Tax, TTTB-Estate Tax Audit, or TTTB-Estate Tax, must be mailed to one of these addresses instead:

If you are sending by U.S. Mail:

**NYS TAX DEPARTMENT
TDAB/ESTATE TAX
W A HARRIMAN CAMPUS
ALBANY NY 12227-2994**

If you are sending by a private delivery service:

**NYS TAX DEPARTMENT
TDAB/ESTATE TAX
90 COHOES AVENUE
GREEN ISLAND NY 12183-1515**

Note: Forms mailed to the old address may be delayed in processing.

Private delivery services

If you choose, you may use a private delivery service, instead of the U.S. Postal Service, to mail in your form and tax payment. However, if, at a later date, you need to establish the date you filed or paid your tax, you cannot use the date recorded by a private delivery service **unless** you used a delivery service that has been designated by the U.S. Secretary of the Treasury or the Commissioner of Taxation and Finance. (Currently designated delivery services are listed in Publication 55, *Designated Private Delivery Services*. See *Need help?* below for information on obtaining forms and publications.) If you have used a designated private delivery service and need to establish the date you filed your form, contact that private delivery service for instructions on how to obtain written proof of the date your form was given to the delivery service for delivery.

Need help?



Visit our Web site at **www.tax.ny.gov**

- get information and manage your taxes online
- check for new online services and features



Telephone assistance

Estate Tax Information Center: (518) 457-5387

To order forms and publications: (518) 457-5431



Text Telephone (TTY) Hotline (for persons with hearing and speech disabilities using a TTY):

If you have access to a TTY, contact us at (518) 485-5082. If you do not own a TTY, check with independent living centers or community action programs to find out where machines are available for public use.



Persons with disabilities: In compliance with the Americans with Disabilities Act, we will ensure that our lobbies, offices, meeting rooms, and other facilities are accessible to persons with disabilities. If you have questions about special accommodations for persons with disabilities, call the information center.