

2023 GIFT TAX WORKSHEET

DONOR INFORMATION

Your Full Name	
Your Social Security Number	
Your Citizenship (i.e. United States, Canada, etc.)	

IF YOU HAVE MOVED, PLEASE UPDATE YOUR CONTACT INFORMATION.

Street address of donors	
Phone Numbers	
Email Address	

SPOUSE INFORMATION (if applicable)

Spouse's full name	
Spouse's Social Security Number	
Spouse's Citizenship (i.e. United States, Canada, etc.)	

Do you have a predeceased spouse for whom a federal estate tax return (Form 706) was filed electing portability? _____ (Yes or No) If yes, please provide us with such Return.

PRIOR YEAR GIFT TAX RETURNS

Please attach copies of all gift tax returns (unless we have previously prepared your gift tax returns)

TRUST INFORMATION (complete for each separate trust agreement)

Name of Trust	
Date Signed	
Taxpayer identification number of each separate trust created by such agreement	

BENEFICIARY INFORMATION: Please list each trust beneficiary by his or her full name and please provide each beneficiary's mailing address:

<i>Name of Beneficiary</i>	<i>Mailing Address</i>

Are any of the beneficiaries listed above also beneficiaries of any other trusts (created by you or any other person) to which gifts are being made?

_____ (Yes or No) If yes, please provide a copy of the applicable trust agreement(s).

2023 GIFTS

Date of Gift	Value of Gift at Date of Gift	Donor	Donor's Tax Basis in Gift (if not a gift of cash)	Description of Gift (i.e. cash, insurance premiums, etc.)	Recipient of Gift (if the gift is to trust, please specify the trust by name; if to an individual, please specify the individual's relationship to the donor)	Separate Property (Partition Executed?)	Community Property

FAMILY INFORMATION

CHILD 1:

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Children of Child 1 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Grandchildren of Child 1 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

CHILD 2:

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Children of Child 2 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Grandchildren of Child 2 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

CHILD 3:

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Children of Child 3 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Grandchildren of Child 3 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

CHILD 4:

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Children of Child 4 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Grandchildren of Child 4 (if any)

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____

Name: _____ Address: _____

Telephone/Email: _____ Date of birth: _____