

**United States Estate (and Generation-Skipping Transfer)  
Tax Return**

Department of the Treasury  
Internal Revenue Service

Estate of a citizen or resident of the United States (see separate instructions).  
To be filed for decedents dying after December 31, 1998.  
For Paperwork Reduction Act Notice, see page 1 of the instructions.

|  |  |  |  |   |  |
|--|--|--|--|---|--|
| <b>Part 1. - Decedent and Executor</b> | <b>1a</b> Decedent's first name and middle initial (and maiden name, if any)<br><b>Harry P.</b>  | <b>1b</b> Decedent's last name<br><b>Jones</b>   | <b>2</b> Decedent's social security no.<br><b>444-75-6980</b>            |   |  |
|  | <b>3a</b> Legal residence (domicile) at time of death (county, state, and ZIP code or foreign country)<br><b>Madison County, Wisconsin</b>       | <b>3b</b> Year domicile established<br><b>1943</b>   | <b>4</b> Date of birth<br><b>01-15-23</b>                                | <b>5</b> Date of death<br><b>November 1, 2000</b> |  |
|  | <b>6a</b> Name of executor (see page 4 of the instructions)<br><b>June A. Jones</b>  | <b>6b</b> Executor's address (number and street including apartment or suite no. or rural route; city, town, or post office; state; and ZIP code)<br><b>5873 Oak Street<br/>Madison, Wisconsin</b> |  |   |  |
|  | <b>6c</b> Executor's social security number (see page 4 of the instructions)<br><b>756-33-8903</b>   |  |  |   |  |
|  | <b>7a</b> Name and location of court where will was probated or estate administered<br><b>Wisconsin Circuit Court, Madison County, Wisconsin</b> |  |  | <b>7b</b> Case number<br><b>56565774</b>          |  |
|  | <b>8</b> If decedent died testate, check here > <input checked="" type="checkbox"/> and attach a certified copy of the will.                     |  | <b>9</b> If Form 4768 is attached, check here > <input type="checkbox"/> |   |  |
|  | <b>10</b> If Schedule R-1 is attached, check here > <input type="checkbox"/>   |  |  |   |  |

|  |   |           |             |
|--|---|-----------|-------------|
| <b>Part 2. - Tax Computation</b>   | <b>1</b> Total gross estate (from Part 5, Recapitulation, page 3, item 12) . . . . .  | <b>1</b>  | \$4,759,991 |
|  | <b>2</b> Total allowable deductions (from Part 5, Recapitulation, page 3, item 23) . . . . .  | <b>2</b>  | 4,084,991   |
|  | <b>3</b> Taxable estate (subtract line 2 from line 1) . . . . .   | <b>3</b>  | \$675,000   |
|  | <b>4</b> Adjusted taxable gifts (total taxable gifts (within the meaning of section 2503) made by the decedent after December 31, 1976, other than gifts that are includible in decedent's gross estate (section 2001(b)) . . . . .   | <b>4</b>  | 0           |
|  | <b>5</b> Add lines 3 and 4 . . . . .  | <b>5</b>  | \$675,000   |
|  | <b>6</b> Tentative tax on the amount on line 5 from Table A in the instructions . . . . .   | <b>6</b>  | \$220,550   |
|  | <b>7a</b> If line 5 exceeds \$10,000,000, enter the lesser of line 5 or \$17,184,000. If line 5 is \$10,000,000 or less, skip lines 7a and 7b and enter -0- on line 7c . . . . .  | <b>7a</b> | \$0         |
|  | <b>b</b> Subtract \$10,000,000 from line 7a . . . . .   | <b>7b</b> | 0           |
|  | <b>c</b> Enter 5% (.05) of line 7b . . . . .  | <b>7c</b> | 0           |
|  | <b>8</b> Total tentative tax (add lines 6 and 7c) . . . . .   | <b>8</b>  | \$220,550   |
|  | <b>9</b> Total gift tax payable with respect to gifts made by the decedent after December 31, 1976. Include gift taxes by the decedent's spouse for such spouse's share of split gifts (section 2513) only if the decedent was the donor of these gifts and they are includible in the decedent's gross estate (see instructions) . . . . . | <b>9</b>  | 0           |
|  | <b>10</b> Gross estate tax (subtract line 9 from line 8) . . . . .  | <b>10</b> | \$220,550   |
|  | <b>11</b> Maximum unified credit (applicable credit amount) against estate tax . . . . .  | <b>11</b> | \$220,550   |
|  | <b>12</b> Adjustment to unified credit (applicable credit amount). (This adjustment may not exceed \$6,000. See page 4 of the instructions.) . . . . .  | <b>12</b> | 0           |
|  | <b>13</b> Allowable unified credit (applicable credit amount) (subtract line 12 from line 11) . . . . .   | <b>13</b> | 220,550     |
|  | <b>14</b> Subtract line 13 from line 10 (but do not enter less than zero) . . . . .   | <b>14</b> | \$0         |
|  | <b>15</b> Credit for state death taxes. Do not enter more than line 14. Compute the credit by using the amount on line 3 less \$60,000. See Table B in the instructions and <b>attach credit evidence</b> (see instructions) . . . . .  | <b>15</b> | 0           |
|  | <b>16</b> Subtract line 15 from line 14 . . . . .   | <b>16</b> | \$0         |
|  | <b>17</b> Credit for Federal gift taxes on pre-1977 gifts (section 2012) (attach computation) . . . . .   | <b>17</b> | \$0         |
|  | <b>18</b> Credit for foreign death taxes (from Schedule(s) P). (Attach Form(s) 706CE) . . . . .   | <b>18</b> | 0           |
|  | <b>19</b> Credit for tax on prior transfers (from Schedule Q) . . . . .   | <b>19</b> | 0           |
|  | <b>20</b> Total (add lines 17, 18, and 19) . . . . .  | <b>20</b> | 0           |
|  | <b>21</b> Net estate tax (subtract line 20 from line 16) . . . . .  | <b>21</b> | \$0         |
|  | <b>22</b> Generation-skipping transfer taxes (from Schedule R, Part 2, line 10) . . . . .   | <b>22</b> | 0           |
|  | <b>23</b> Total transfer taxes (add lines 21, 22, and 23) . . . . .   | <b>23</b> | \$0         |
|  | <b>24</b> Prior payments. Explain in an attached statement . . . . .  | <b>24</b> | \$0         |
|  | <b>25</b> United States Treasury bonds redeemed in payment of estate tax . . . . .  | <b>25</b> | 0           |
| <b>26</b> Total (add lines 24 and 25) . . . . .                                  | <b>26</b>   | 0         |             |
| <b>27</b> Balance due (or overpayment) (subtract line 26 from line 23) . . . . . | <b>27</b>   | \$0       |             |

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer other than the executor is based on all information of which preparer has any knowledge.

Signature(s) of executor(s) \_\_\_\_\_ Date November 1, 2000

Signature of preparer other than executor \_\_\_\_\_ Address (and ZIP code) 100 Main Street  
Madison, Wisconsin Date November 1, 2000

**Estate of:** Harry P. Jones

**Part 3.-Elections by the Executor**

| Please check the "Yes" or "No" box for each question. (See instructions beginning on page 5.) |  | Yes | No |
|---|--|-----|----|
| 1   | Do you elect alternate valuation?  | X   |    |
| 2   | Do you elect special use valuation?<br>If "Yes," you must complete and attach Schedule A-1   |     | X  |
| 3   | Do you elect to pay the taxes in installments as described in section 6166?<br>If "Yes," you must attach the additional information described on page 8 of the instructions. |     | X  |
| 4   | Do you elect to postpone the part of the taxes attributable to a reversionary or remainder interest as described in section 6163?  |     | X  |

**Part 4.-General Information (Note: Please attach the necessary supplemental documents. You must attach the death certificate.)**  
(See instructions on page 9.)

Authorization to receive confidential tax information under Regulations section 601.504(b)(2)(i), to act as the estate's representative before the Internal Revenue Service, and to make written or oral presentations on behalf of the estate if return prepared by an attorney, accountant, or enrolled agent for the executor:

|  |                    |  |
|--|--------------------|--|
| Name of representative (print or type)<br><u>Sam Spade</u> | State<br><u>WI</u> | Address (number, street, and room or suite no., city, state, and ZIP code)<br><u>100 Main Street<br/>Madison, WI</u> |
|--|--------------------|--|

I declare that I am the  attorney/  certified public accountant/  enrolled agent (you must check the applicable box) for the executor and prepared this return for the executor. I am not under suspension or disbarment from practice before the Internal Revenue Service and am qualified to practice in the state shown above.

|           |                                 |                          |   |
|-----------|---------------------------------|--------------------------|---|
| Signature | CAF number<br><u>3547337238</u> | Date<br><u>11- -2000</u> | Telephone number<br><u>579-376-5129</u> |
|-----------|---------------------------------|--------------------------|---|

1 Death certificate number and issuing authority (attach a copy of the death certificate to this return).  
E.P. 5657834 issued by Wisconsin Department Of Health

2 Decedent's business or occupation. If retired, check here >  and state decedent's former business or occupation.  
Executive

3 Marital status of the decedent at time of death:  
 Married  
 Widow or widower-Name, SSN, and date of death of deceased spouse > .....  
 Single  
 Legally separated  
 Divorced-Date divorce decree became final > .....

|  |   |   |
|--|---|---|
| 4a Surviving spouse's name<br><u>June A. Jones</u> | 4b Social security number<br><u>756-33-8903</u> | 4c Amount received (see page 9 of the instructions)<br><u>\$4,055,944</u> |
|--|---|---|

5 Individuals (other than the surviving spouse), trusts, or other estates who receive benefits from the estate (do not include charitable beneficiaries shown in Schedule O) (see instructions). For Privacy Act Notice (applicable to individual beneficiaries only), see the Instructions for Form 1040.

| Name of individual, trust, or estate receiving \$5,000 or more | Identifying number | Relationship to decedent | Amount (see instructions) |
|--|--------------------|--------------------------|---------------------------|
| June A. Jones  | 756-33-8903        | wife                     | \$206,813                 |
| Henry P. Jones, Jr.  | 746-53-9998        | son                      | 234,094                   |
| Sally Jones Smith  | 476-39-2465        | daughter                 | 234,094                   |

All unascertainable beneficiaries and those who receive less than \$5,000 > .....

**Total** ..... **\$675,001**

| Please check the "Yes" or "No" box for each question. |   | Yes | No |
|---|---|-----|----|
| 6   | Does the gross estate contain any section 2044 property (qualified terminable interest property (QTIP) from a prior gift or estate) (see page 9 of the instructions)? |     | X  |

**Part 4.-General Information (continued)**

| Please check the "Yes" or "No" box for each question.   |   | Yes | No |
|---|---|-----|----|
| <b>7a</b>   | Have Federal gift tax returns ever been filed? . . . . .<br>If "Yes," please attach copies of the returns, if available, and furnish the following information:   |     | X  |
| <b>7b</b>   | Period(s) covered   |     |    |
| <b>7c</b>   | Internal Revenue office(s) where filed  |     |    |
| <b>If you answer "Yes" to any of questions 8-16, you must attach additional information as described in the instructions.</b> |   |     |    |
| <b>8a</b>   | Was there any insurance on the decedent's life that is not included on the return as part of the gross estate? . . . . .  |     | X  |
| <b>b</b>  | Did the decedent own any insurance on the life of another that is not included in the gross estate? . . . . .   |     | X  |
| <b>9</b>  | Did the decedent at the time of death own any property as a joint tenant with right of survivorship in which (a) one or more of the other joint tenants was someone other than the decedent's spouse, and (b) less than the full value of the property is included on the return as part of the gross estate? If "Yes," you must complete and attach Schedule E . . . . . |     | X  |
| <b>10</b>   | Did the decedent, at the time of death, own any interest in a partnership or unincorporated business or any stock in an inactive or closely held corporation? . . . . .   |     | X  |
| <b>11</b>   | Did the decedent make any transfer described in section 2035, 2036, 2037, or 2038 (see the instructions for Schedule G beginning on page 11 of the separate instructions)? If "Yes," you must complete and attach Schedule G . . . . .  |     | X  |
| <b>12</b>   | Were there in existence at the time of the decedent's death:  |     |    |
| <b>a</b>  | Any trusts created by the decedent during his or her lifetime? . . . . .  |     | X  |
| <b>b</b>  | Any trusts not created by the decedent under which the decedent possessed any power, beneficial interest, or trusteeship? . . . . .   |     | X  |
| <b>13</b>   | Did the decedent ever possess, exercise, or release any general power of appointment? If "Yes," you must complete and attach Schedule H . . . . .   |     | X  |
| <b>14</b>   | Was the marital deduction computed under the transitional rule of Public Law 97-34, section 403(e)(3) (Economic Recovery Tax Act of 1981)? . . . . .<br>If "Yes," attach a separate computation of the marital deduction, enter the amount on item 20 of the Recapitulation, and note on item 20 "computation attached."  |     | X  |
| <b>15</b>   | Was the decedent, immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule I? If "Yes," you must complete and attach Schedule I . . . . .   |     | X  |
| <b>16</b>   | Was the decedent ever the beneficiary of a trust for which a deduction was claimed by the estate of a pre-deceased spouse under section 2056(b)(7) and which is not reported on this return? If "Yes," attach an explanation . . . . .  |     | X  |

**Part 5.-Recapitulation**

| Item number | Gross estate   | Alternate value | Value at date of death |
|-------------|--|-----------------|------------------------|
| <b>1</b>    | Schedule A-Real Estate . . . . .   | \$358,000       | \$358,000              |
| <b>2</b>    | Schedule B-Stocks and Bonds . . . . .  | 3,650,000       | 3,743,000              |
| <b>3</b>    | Schedule C-Mortgages, Notes, and Cash . . . . .  | 751,991         | 751,991                |
| <b>4</b>    | Schedule D-Insurance on the Decedent's Life (attach Form(s) 712). . . . .  | 0               | 0                      |
| <b>5</b>    | Schedule E-Jointly Owned Property (attach Form(s) 712 for life insurance). . . . .   | 0               | 0                      |
| <b>6</b>    | Schedule F-Other Miscellaneous Property (attach Form(s) 712 for life insurance) . . . . .                                    | 0               | 0                      |
| <b>7</b>    | Schedule G-Transfers During Decedent's Life (attach Form(s) 712 for life insurance) . . . . .                                | 0               | 0                      |
| <b>8</b>    | Schedule H-Powers of Appointment . . . . .   | 0               | 0                      |
| <b>9</b>    | Schedule I-Annuities . . . . .   | 0               | 0                      |
| <b>10</b>   | Total gross estate (add items 1 through 9) . . . . .   | \$4,759,991     | \$4,852,991            |
| <b>11</b>   | Schedule U - Qualified Conservation Easement Exclusion . . . . .   | 0               | 0                      |
| <b>12</b>   | Total gross estate less exclusion (subtract item 11 from item 10). Enter here and on line 1 of the Tax Computation . . . . . | \$4,759,991     | \$4,852,991            |
| Item number | Deductions   | Amount          |                        |
| <b>13</b>   | Schedule J-Funeral Expenses and Expenses Incurred in Administering Property Subject to Claims . . . . .                      | \$29,047        |                        |
| <b>14</b>   | Schedule K-Debts of the Decedent . . . . .   | 0               |                        |
| <b>15</b>   | Schedule K-Mortgages and Liens . . . . .   | 0               |                        |
| <b>16</b>   | Total of items 13 through 15 . . . . .   | \$29,047        |                        |
| <b>17</b>   | Allowable amount of deductions from item 16 (see the instructions for item 17 of the Recapitulation) . . . . .               | \$29,047        |                        |
| <b>18</b>   | Schedule L-Net Losses During Administration . . . . .  | 0               |                        |
| <b>19</b>   | Schedule L-Expenses Incurred in Administering Property Not Subject to Claims . . . . .                                       | 0               |                        |
| <b>20</b>   | Schedule M-Bequests, etc., to Surviving Spouse . . . . .   | 4,055,944       |                        |
| <b>21</b>   | Schedule O-Charitable, Public, and Similar Gifts and Bequests. . . . .   | 0               |                        |
| <b>22</b>   | Schedule T - Qualified Family-Owned Business Interest Deduction . . . . .  | 0               |                        |
| <b>23</b>   | Total allowable deductions (add items 17 through 21). Enter here and on line 2 of the Tax Computation . . . . .              | \$4,084,991     |                        |

**Estate of:** Harry P. Jones

**SCHEDULE A--Real Estate**

*(For jointly owned property that must be disclosed on Schedule E, see the instructions for Schedule E.)*

*(Real estate that is part of a sole proprietorship should be shown on Schedule F. Real estate that is included in the gross estate under section 2035, 2036, 2037, or 2038 should be shown on Schedule G. Real estate that is included in the gross estate under section 2041 should be shown on Schedule H.)*

*(If you elect section 2032A valuation, you must complete Schedule A and Schedule A-1.)*

| Item number  | Description  | Alternate valuation date | Alternate value | Value at date of death |
|--|--|--------------------------|-----------------|------------------------|
| 1  | Land With Improvements<br>-- street address: 5673 Oak Street, Madison, Wisconsin -- legal description: Lot 56 of Southwest Subdivision of Madison, Wisconsin -- owned as tenant in common -- valuation based upon real estate tax valuation -- not disposed of within 6 months following death | 05-01-01                 | \$358,000       | \$358,000              |
| Total from continuation schedules (or additional sheets) attached to this schedule . . . . |  |                          | 0               | 0                      |
| <b>TOTAL.</b> (Also enter on Part 5, Recapitulation, page 3, at item 1.) . . . . .         |  |                          | \$358,000       | \$358,000              |

(If more space is needed, attach the continuation schedule from the end of this package or additional sheets of the same size.)  
(See the instructions on the reverse side.)

Estate of: Harry P. Jones

**SCHEDULE B--Stocks and Bonds**

(For jointly owned property that must be disclosed on Schedule E, see the instructions for Schedule E.)

| Item number  | Description including face amount of bonds or number of shares and par value where needed for identification. Give CUSIP number if available.   | Unit value | Alternate valuation date | Alternate value | Value at date of death |
|--|---|------------|--------------------------|-----------------|------------------------|
| 1  | 57,000 shares<br>Southwest Storage Company no par value common stock --<br>no established trading market -- valuation based on<br>appraisal -- not disposed of within 6 months following<br>death | \$65.6667  | 05-01-01                 | \$3,650,000     | \$3,743,000            |
| Total from continuation schedules (or additional sheets) attached to this schedule . . . |   |            |                          | 0               | 0                      |
| <b>TOTAL.</b> (Also enter on Part 5, Recapitulation, page 3, at item 2.) . . . . .       |   |            |                          | \$3,650,000     | \$3,743,000            |

(If more space is needed, attach the continuation schedule from the end of this package or additional sheets of the same size.)  
 (The instructions to Schedule B are in the separate instructions.)

**Estate of:** Harry P. Jones

**SCHEDULE C--Mortgages, Notes, and Cash**

*(For jointly owned property that must be disclosed on Schedule E, see the instructions for Schedule E.)*

| Item number  | Description   | Alternate valuation date | Alternate value | Value at date of death |
|--|---|--------------------------|-----------------|------------------------|
| 1  | Checking Account<br>Number: 567389, First National Bank -- Madison -- Wisconsin | 05-01-01                 | \$15,673        | \$15,673               |
| 2  | Time Deposit<br>Number: 563839 -- First National Bank -- Madison -- Wisconsin   | 05-01-01                 | 732,756         | 732,756                |
|  | Accrued interest at date of death   |                          | 3,562           | 3,562                  |
| Total from continuation schedules (or additional sheets) attached to this schedule . . . |   |                          | 0               | 0                      |
| <b>TOTAL.</b> (Also enter on Part 5, Recapitulation, page 3, at item 3.) . . . . .       |   |                          | \$751,991       | \$751,991              |

(If more space is needed, attach the continuation schedule from the end of this package or additional sheets of the same size.)  
(See the instructions on the reverse side.)

Estate of: Harry P. Jones

**SCHEDULE J--Funeral Expenses and Expenses Incurred in Administering Property Subject to Claims**

**Note:** Do not list on this schedule expenses of administering property not subject to claims. For those expenses, see the instructions for Schedule L.

If executors commissions, attorney fees, etc., are claimed and allowed as a deduction for estate tax purposes, they are not allowable as a deduction in computing the taxable income of the estate for Federal income tax purposes. They are allowable as an income tax deduction on Form 1041 if a waiver is filed to waive the deduction on Form 706 (see the Form 1041 instructions).

| Item number   | Description   | Expense amount | Total Amount    |
|---|---|----------------|-----------------|
| <b>A. Funeral expenses:</b>   |   |                |                 |
| 1   | Funeral Home expense paid to April Funeral Home, Madison, Wisconsin   | \$3,570        |                 |
|   | Total funeral expenses . . . . .  |                | \$3,570         |
| <b>B. Administration expenses:</b>  |   |                |                 |
| 1   | Executors' commissions-amount estimated/ <del>agreed upon</del> /paid. (Strike out the words that do not apply.)    |                | 0               |
| 2   | Attorney fees-amount estimated/ <del>agreed upon</del> /paid. (Strike out the words that do not apply.)             |                | 25,477          |
| 3   | Accountant fees-amount estimated/ <del>agreed upon</del> /paid. (Strike out the words that do not apply.)           |                | 0               |
|   | Miscellaneous expenses:   | Expense amount |                 |
|   | Total miscellaneous expenses from continuation schedules (or additional sheets) attached to this schedule . . . . . | 0              |                 |
|   | Total miscellaneous expenses . . . . .  |                | 0               |
| <b>TOTAL.</b> (Also enter on Part 5, Recapitulation, page 3, at item 13.) |   |                | <b>\$29,047</b> |

(If more space is needed, attach the continuation schedule from the end of this package or additional sheets of the same size.)  
 (See the instructions on the reverse side.)

Estate of: Harry P. Jones

**SCHEDULE M--Bequests, etc., to Surviving Spouse**

**Election To Deduct Qualified Terminable Interest Property Under Section 2056(b)(7).** If a trust (or other property) meets the requirements of qualified terminable interest property under section 2056(b)(7), and

- a. The trust or other property is listed on Schedule M, and
- b. The value of the trust (or other property) is entered in whole or in part as a deduction on Schedule M, then unless the executor specifically identifies the trust (all or a fractional portion or percentage) or other property to be excluded from the election the executor shall be deemed to have made an election to have such trust (or other property) treated as qualified terminable interest property under section 2056(b)(7).

If less than the entire value of the trust (or other property) that the executor has included in the gross estate is entered as a deduction on Schedule M, the executor shall be considered to have made an election only as to a fraction of the trust (or other property). The numerator of this fraction is equal to the amount of the trust (or other property) deducted on Schedule M. The denominator is equal to the total value of the trust (or other property).

**Election To Deduct Qualified Domestic Trust Property Under Section 2056A.** If a trust meets the requirements of a qualified domestic trust under section 2056A(a) and this return is filed no later than 1 year after the time prescribed by law (including extensions) for filing the return, and

- a. The entire value of a trust or trust property is listed on Schedule M, and
- b. The entire value of the trust or trust property is entered as a deduction on Schedule M, then unless the executor specifically identifies the trust to be excluded from the election, the executor shall be deemed to have made an election to have the entire trust treated as qualified domestic trust property.

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did any property pass to the surviving spouse as a result of a qualified disclaimer? . . . . .<br>If "Yes," attach a copy of the written disclaimer required by section 2518(b).   |     | X  |
| <b>2a</b> In what country was the surviving spouse born? <u>United States</u>   |     |    |
| <b>b</b> What is the surviving spouse's date of birth? <u>May 12, 1927</u>  |     |    |
| <b>c</b> Is the surviving spouse a U.S. citizen? . . . . .  | X   |    |
| <b>d</b> If the surviving spouse is a naturalized citizen, when did the surviving spouse acquire citizenship? _____   |     |    |
| <b>e</b> If the surviving spouse is not a U.S. citizen, of what country is the surviving spouse a citizen? _____  |     |    |
| <b>3 Election out of QTIP Treatment of Annuities.</b> -Do you elect under section 2056(b)(7)(C)(ii) <b>not</b> to treat as qualified terminable interest property any joint and survivor annuities that are included in the gross estate and would otherwise be treated as qualified terminable interest property under section 2056(b)(7)(C)? (see instructions) . . . . . |     | X  |

| Item number  | Description of property interests passing to surviving spouse  | Amount      |
|--|--|-------------|
| 1  | Optimum marital deduction amount   | \$4,055,944 |
| Total from continuation schedules (or additional sheets) attached to this schedule . . . . . |  | 0           |
| <b>4</b>   | <b>Total</b> amount of property interests listed on Schedule M . . . . .   | \$4,055,944 |
| <b>5a</b>  | Federal estate taxes payable out of property interests listed on Schedule M . . . . .  | \$0         |
| <b>5b</b>  | Other death taxes payable out of property interests listed on Schedule M . . . . .   | 0           |
| <b>5c</b>  | Federal and state GST taxes payable out of property interests listed on Schedule M . . . . .   | 0           |
| <b>5d</b>  | Add items a, b, and c . . . . .  | 0           |
| <b>6</b>   | Net amount of property interests listed on Schedule M (subtract 5d from 4). Also enter on Part 5, Recapitulation, page 3, at item 20 . . . . . | \$4,055,944 |

(If more space is needed, attach the continuation schedule from the end of this package or additional sheets of the same size.)  
(See the instructions on the reverse side.)