

TRUST & ESTATE ADMINISTRATION

706 Estate Tax Return Module

The 706 Estate Tax Return module of ONESOURCE Trust & Estate Administration offers the Federal 706 and state specific estate and inheritance tax components. The simple to use, comprehensive program delivers a wide range of supporting schedules that produce professional, thorough, and accurate returns for filings. With numerous automated calculations such as prior transfer credit, foreign death tax credit, GST tax and other interrelated calculations, the 706 Estate Tax Return module of ONESOURCE Trust & Estate Administration is in a class by itself.

Since the 706 module is fully integrated with state estate and state inheritance tax programs, we offer a true single entry system. State estate tax programs are available for CT, IL, MA, MD, NY, as well as state inheritance tax components for NJ and PA. Our optional Common Asset Import and third party valuation interface add an additional level of automation to help you prepare high quality tax returns quickly and efficiently.

The 706 module also performs the necessary calculations when a decedent has property outside of his/her resident state. Non-resident returns are currently available for Connecticut, Massachusetts, Maryland, and New York.

As with all of the ONESOURCE Trust & Estate Administration products, the 706 module can be used as a stand-alone product or a fully integrated component of the product suite.

706 MODULE

- Automates tax functions
- Calculates tax return, prior transfer credit, foreign death taxes and more
- Tracks state information and calculates the state death tax deduction

CONTACT US TODAY

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Form 706
(Rev. August 2019)

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

OMB No. 1545-0015

Department of the Treasury
Internal Revenue Service

Part 1. Decedent and Executor

1a Decedent's first name and middle initial (and maiden name, if any) **John D**

1b Decedent's last name **Doe**

2 Decedent's social security no. **111-22-3333**

3a City, town, or post office; county, state or province; country; and ZIP or foreign postal code **Anywhere Bronx NY 18974-1234**

3b Year domicile established **1953**

4 Date of birth **01/10/1958**

5 Date of death **01/01/2023**

6a Name of executor (see instructions) **Bank and Trust Company**

6b Executor's address (number and street including apartment or suite no., city, town, or post office, state or province, country, and ZIP or foreign postal code) and phone no. **100 Industrial Drive Suite 6 Philadelphia PA 19000- (215) 444-3333**

6c Executor's social security number (see instructions) **44-5555555**

6d If there are multiple executors, check here ☒ and attach a list showing the names, addresses, telephone numbers, and SSNs of the additional executors.

7a Name and location of court where will was probated or estate administered **Probate Court**

7b Case number **D-12324**

8 If decedent died testate, check here ☒ and attach a certified copy of the will. 9 If you extended the time to file this Form 706, check here ☐

10 If Schedule R-1 is attached, check here ☒ 11 If you are entering the value of assets included in the gross estate on line 1 pursuant to the special rule of Reg. section 20.2010-2(a)(7)(F), check here ☐

1	Total gross estate less exclusion (from Part 5 - Recapitulation, item 13)	1	19,953,654
2	Tentative total allowable deductions (from Part 5 - Recapitulation, item 24)	2	13,107,736
3a	Tentative taxable estate (subtract line 2 from line 1)	3a	6,845,958
b	State death tax deduction	3b	0
c	Taxable estate (subtract line 3b from line 3a)	3c	6,845,958
4	Adjusted taxable gifts (see instructions)	4	950,000

