

### Information

	Yes	No
1. Did the decedent die testate? ..... <b>If "yes," please attach a copy of the will.</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. During the decedent's lifetime, were there any trusts created (by the decedent or others for the decedent)? <b>If "yes," please attach a copy of the trust.</b>	<input type="checkbox"/>	<input type="checkbox"/>
3. Were any disclaimers filed or elections to take against the will made? ..... <b>If "yes," please attach copies of the disclaimer or election.</b>	<input type="checkbox"/>	<input type="checkbox"/>
4. Have federal gift tax returns ever been filed? ..... <b>If "yes," please attach copies of the returns.</b>	<input type="checkbox"/>	<input type="checkbox"/>
5. Was a federal estate tax return required? ..... <b>If "yes," please attach pages 1, 2, and 3 of Federal Form 706.</b>	<input type="checkbox"/>	<input type="checkbox"/>

6. Marital Status of the decedent at time of death:

- Married
- Name of Surviving Spouse (if applicable) SS full name \_\_\_\_\_
- Social Security Number of Surviving Spouse \_\_\_\_\_
- Single
- Legally Separated
- Divorced
- Widowed

Name of Deceased Spouse \_\_\_\_\_  
 Social Security Number of Deceased Spouse \_\_\_\_\_  
 Date of Death of Deceased Spouse \_\_\_\_\_  
 Case Number of Deceased Spouse's Estate \_\_\_\_\_  
 County of Deceased Spouse's Estate \_\_\_\_\_

7. If widow or widower, was a qualified terminable interest property (QTIP) deduction elected in the predeceased spouse's estate? .....	<input type="checkbox"/>	<input type="checkbox"/>
---	--------------------------	--------------------------

**If "yes," please read information below and complete Schedule F, page 10.**

Section 5731.131 O.R.C. requires the estate to include property in which the decedent had an income interest for life for which a marital deduction was allowed with respect to the transfer of that property under any of the following:

- a. Section 5731.15(A)(1) O.R.C. (for dates of death on or before June 30, 1993)
- b. Section 5731.15(B) O.R.C. (for dates of death on or after July 1, 1993)
- c. Section 2523(f) I.R.C. (lifetime QTIP gift tax election)
- d. Where the decedent's predeceased spouse was not a resident of the State of Ohio but was permitted a marital deduction under Section 2056(b)(7) I.R.C.