



# FORM 706 ESTATE & GENERATION-SKIPPING TRANSFER TAX RETURNS

## QUICK FACTS

- Supports all 21 schedules
- Performs comprehensive calculations for charitable deductions, marital deductions, taxable gifts reconciliation, and Section 6166 deferred payments
- Entries to Schedule M now flow from Estate Property screen by a single X box.

## ESTATE FORMS & SCHEDULES

706	Estate and Generation-Skipping Transfer Tax Return
712	Life Insurance Statement
4768	Application for Extension to Pay Estate Taxes
8801	Credit for Prior Year Minimum Tax - Individual, Estates, and Trusts
8822	Change of Address
CONT	Continuation Schedule
SCH A	Schedule A, Real Estate
SCH A-1	Schedule A-1, Section 2032A Valuation
SCH B	Schedule B, Stocks and Bonds
SCH C	Schedule C, Mortgages, Notes, and Cash
SCH D	Schedule D, Life Insurance
SCH E	Schedule E, Jointly Owned Property
SCH F	Schedule F, Miscellaneous Property
SCH G	Schedule G, Transfers to Descendants
SCH H	Schedule H, Powers of Appointment
SCH I	Schedule I, Annuities

SCH J	Schedule J, Funeral Expenses
SCH K	Schedule K, Debts
SCH L	Schedule L, Net Losses during Administration
SCH M	Schedule M, Bequests to Surviving Spouse
SCH O	Schedule O, Charitable Gifts
SCH P	Schedule P, Credit for Foreign Death Tax
SCH PQ	Schedule P, Credit for Foreign Death Tax and Schedule Q, Credit for Tax on Prior Transfers
SCH Q	Schedule Q, Credit for Tax on Prior Transfers
SCH R	Schedule R, Generation-Skipping Transfer Tax
SCH R-1	Generation-Skipping Transfer Tax Payment Voucher
SCH U	Schedule U, Qualified Conservation Easement Exclusion

## WORKSHEETS, ATTACHMENTS, & OTHER FORMS

SCH GH	Schedule G, Transfers and Schedule H, Powers of Appointment
706-D	Sec 2057 Additional Estate Tax Return
706-GS(D)	Distribution from Generation-Skipping
706-GS(D-1)	Notification of Distribution from Generation-Skipping Trust
706GST	Generation-Skipping Transfer Tax Return for Terminations

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