2019 Form OR-706

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Oregon Department of Revenue



Office	use	only	

Oregon Estate	Transfer Tax Retur	n			
			<u>-do not submit photo</u> (Print or type)	осору.	
● Amended	● Decedent's first name	● Initial ● Decedent's			Decedent's Social Security number (SSN
Return	- Doddone mot name	O militar O D O O O O O O O O O O O O O O O O O	o laot hamo	, Estate	
Decedent's domicile (leg	gal residence)			, Estate	
● City	●Co	ountv		●State	
- 5,					
●Date of birth	● Date of death	Year domicile establish	ed		
/ /	/ /			● An extension of ti	me ●A separate
Is the estate being pro	obated in Oregon?			to file is included	election is claimed
● If Yes — Oregon co	ounty:			●An extension of ti	me
Oregon probate nur	mber:			to pay is included	<u> </u>
■ Executor's name			● Executor's SSN		● Executor's FEIN
					_
● Executor's mailing add	dress		● City		State ZIP code
■ Executor's title					• Executor's phone
					() –
	Include a co	opy of all required so		porting documents.	
			x computation		0.0
_	e (from page 3, part 5, line 5				.00
	eductions (from page 3, par	,			.00
					0.0
•	ne 1 minus lines 2 and 3, if a	"		_	.00
=	x (see instructions, part 6, fo		_	<u> </u>	
	operty located in Oregon (se				%
	e (line 6 divided by line 1, rour	•	•	_	.00
	regon (line 5 multiplied by line of the state of the stat				.00
	Credit (from Schedule OR-	•			.00
`	ne 8 minus line 9) priginal due date of return (s				.00
	ninus line 11)	,			.00
,	e 11 minus line 10)				.00
	ling or late payment (see ins				.00
	ayment (see instructions)				.00
	nes 12, 14, and 15)				.00
•	ninus lines 14 and 15)				.00
	,				
Signature and authorizati	ion: Under penalties of false swear	ring. I declare that I have exan	nined this return, including	accompanying schedules ar	nd statements. To the best of my
					of which the preparer has any knowledge.
Executor's signature			Date	Executo	r's phone
Χ			/ /	() —
Title			Executor's SSN	Executo	r's FEIN
				_	
	ox to authorize the following			ial tax information relatir	ng to this return.
●Preparer's first r	name (print) Initial Prepare	er's last name	Title		
●Preparer's maili	ng address		●City		●State
				1	
Signature of preparation	arer		Phone	Date	●License number
X			()	- /	/

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● Decedent's first name	● Initial	● Decede	ent's last	name		, Estate				
Part 3—Elections by	the ex	ecutor			С	heck the "Yes"	box for eac	ch questior	n, if applicable. See insti	ructions.
Do you elect alternate va	aluation	?							• 1.	Yes
Do you elect special use Do you elect to postpond in Section 6163?	e the pa	rt of the t	axes at	tributable to	a reversi	onary or remainde	er interest as	described		Yes Yes
Part 4—General infor	matio	n		You must in	nclude a	copy of the death	n certificate a	and all supp	orting documents. See ins	tructions.
Marital status of the det Married Single		at time of Legally s		d Div	orced:	● Date divorce dec	cree became fi	inal		
Widow or widower ●Name of	decease	d spouse	Initial	● Last name			●SSN of	deceased _	● Date of death	
2. •2a. Surviving spouse's nan	ne • Initia	al ●Last r	name			●2b. Surviv	vor's SSN		●2c. Amount received (see	instruction
● Indiv. receiving \$5,000 or more	see instr	uctions).			ce (appli		l beneficiarie	•	include charitable beneficia instructions for federal Fo • Amount (see instructions	rm 1040.
●Name of trust or estate receive	ing \$5,00	0 or more				SSN 	●FEIN —			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions	. 00
Name of trust or estate receiving	ing \$5,00	0 or more				SSN 	●FEIN —			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions)	. 0 0
●Name of trust or estate receiv	ing \$5,00	0 or more				SSN 	●FEIN —			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions)	.00
●Name of trust or estate receive	ing \$5,00	0 or more				SSN	●FEIN _			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions)	.00
Name of trust or estate receiving	ing \$5,00	0 or more				SSN	●FEIN —			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions)	.00
Name of trust or estate receiving	ing \$5,00	0 or more				SSN 	●FEIN —			
● Indiv. receiving \$5,000 or more	Initial • La	ast name				Relation to decede	nt		Amount (see instructions)	. 0 0
●Name of trust or estate receive	ing \$5,00	0 or more				SSN 	●FEIN -			
3b. All unascertainable bene	eficiaries	and thos	e who i	receive less t	han \$5,0	00		3k	o	.00
3c. Total								• 3d	2.	.00

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Schedule B - Stocks and bonds	● Dec	cedent's first name	● Initial	● Decedent's last name						
4. Loss the gross estate contain any Section 2044 property (qualified terminable interest property (QTIP) from a prior gift or estate)? (Schodule F). ### Wow answer "Yes" to any of questions 5-12, you must include additional information as described in the instructions. 5. a. Was any insurance on the decedent's life not included on the return as part of the gross estate? (Schedule D, Form 712) 5. b. Did the decedent own any insurance on the life of another that is not included in the gross estate? (Schedule D, Form 712) 5. 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? (Schedule D, Form 712) 6. Ves. 7. a. Did the decedent, at the time of death, own any interest in a partnership or unincorporated business, limited liability company, or any stock in a inactive or closely led corporation? 5. If yes, was the value of any interest owned (from 7a) discounted on this estate tax return? If yes, see the federal instructions on reporting the total accumulated or effective discounts taken on Schedule For G					, Es	tate	Check the "Yes" box for each	auestion.	if applic	cable.
estate? (Schedule F). If you answer "vis" to any of questions 5-12, you must include additional information as described in the instructions. 5. a. Was any insurance on the decedent's life not included on the return as part of the gross estate? (Schedule D, Form 712). 5. b. Did the decedent own any insurance on the life of another that is not included in the gross estate? (Schedule D, Form 712). 5. b. Did the decedent, and 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? (Schedule D. 7. b. Did the decedent, at the time of death, own any interest in a partnership or unincorporated business, limited liability company, or any stock in an inactive or closely held corporation? 8. Life yes, was the value of any interest owned (from 72) discounted on this estate tax return? If yes, see the federal instructions on reporting the total accumulated or effective discounts taken on Schedule F or G. 9. Were there in existence at the time of the decedent's death: 8. Ves 9. Were there in existence at the time of the decedent's death: 8. Any trusts created by the decedent during his or her lifetime? (Schedule B and trust document). 9. D. Any trusts root created by the decedent during his or her lifetime? (Schedule B and trust document). 9. The decedent even the properties of the decedent possessed any power, beneficial interest, or trusteesing? (Schedule B and trust document). 9. The decedent even possess, exercise, or release any general power of appointment? (Schedule B and trust document). 9. The decedent even the beneficiary of a runs for which a deduction was claimed by the estate of a pre-deceased spouse under School 2058(b)(7) which isn't reported on this return? If "Yes," include an explanation. 9. Schedule B – Stocks and bonds. 9. Schedule B – Stocks and bonds. 9. Schedule	4. [oes the gross estate c	ontain a	ny Section 2044 property [qualified	terminable i	nterest		, quodion,	αρρ	Judio.
5. a. Was any insurance on the decedent is life not included on the return as part of the gross estate? (Schedule D, Form 712) 5 a	е	state]? (Schedule F)						• 4.		Yes
b. Did the decedent own any insurance on the life of another that is not included in the gross estate? (Schedule D, Form 712). 6. 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? (Schedule B). 7. a. Did the decedent, at the time of death, own any interest [Schedule B). 8. Did the decedent at the time of death, own any interest in a partnership or unincorporated business, limited liability company, or any stock in an inactive or closely held corporation?. 8. Did the decedent make any transfer described in Section 2035, 2036, 2037, or 2038? (Schedule G). 8. Did the decedent make any transfer described in Section 2035, 2036, 2037, or 2038? (Schedule G). 9. Were there in existence at the time of the decedent's death: a. Any trusts created by the decedent under which the decedent possessed any power, beneficial interest, or trustreship? (Schedule F and trust document). 9. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule F and trust document). 9. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule F). 10. Uses the decedent ever the beneficiary of a trust for which a deduction was claimed by the estate of a pre-deceased spouse under Section 2050(b)(7) which isn't reported on this return? If "Yes," include an explanation. 11. 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 2050(b)(7) which isn't reported on this return? If "Yes," include an explanation. 12. 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 2050(b)(7) which isn't reported on this return? If "Yes," include an explanation. 13. Sched	If you	u answer "Yes" to any	of ques	stions 5–12, you must include add	itional info	rmation	n as described in the instructions.			
in the gross estate? (Schedule D, Form 712) 6	5. a	. Was any insurance or	n the dec	cedent's life not included on the retu	ırn as part o	f the gr	oss estate? (Schedule D, Form 712)	• 5a.		Yes
6. Did the daecedent, 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? (Schedule E)	b	. Did the decedent own	any insu	urance on the life of another that is no	ot included					
6. Did the daecedent, 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? (Schedule E)										Yes
included on the return as pert of the gross estate? (Schedule E)	6. D									
7. a. Did the decedent, at the time of death, own any interest in a partnership or unincorporated business, limited liability company, or any stock in an inactive or closely held corporation? b. if yes, was the value of any interest owned from 7a) discounted on this estate tax return? If yes, see the federal instructions on reporting the total accumulated or effective discounts taken on Schedule F or G	0	f the other joint tenants	s was so	meone other than the decedent's sp	oouse, and (b) less	than the full value of the property is			ı
company, or any stock in an inactive or closely held corporation?	ir	ncluded on the return a	s part of	the gross estate? (Schedule E)				6 .		Yes
b. If yes, was the value of any interest owned (from 7a) discounted on this estate tax return? If yes, see the federal instructions on reporting the total accumulated or effective discounts taken on Schedule F or G	7. a	. Did the decedent, at	the time	of death, own any interest in a partr	nership or ui	nincorp	orated business, limited liability			ı
instructions on reporting the total accumulated or effective discounts taken on Schedule F or G. 7b. Yes 8. Did the decedent make any transfer described in Section 2035, 2036, 2037, or 20387 (Schedule G)		company, or any stoo	k in an i	nactive or closely held corporation?				• 7a.		Yes
8. Did the decedent make any transfer described in Section 2035, 2036, 2037, or 2038? (Schedule G) 9. Were there in existence at the time of the decedent's death: a. Any trusts created by the decedent during his or her lifetime? (Schedule G and trust document). b. Any trusts created by the decedent under which the decedent possessed any power, beneficial interest, or trusteeship? (Schedule F and trust document). 9a. Yes b. Any trusts not created by the decedent under which the decedent possessed any power, beneficial interest, or trusteeship? (Schedule F and trust document). 9b. Yes 10. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule H). 11. Was the decedent, immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule 1? (Schedule H). 12. Was the decedent in immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule 1? (Schedule I). 11. Yes 12. Was the decedent were the beneficiary of a trust for which a deduction was claimed by the estate of a pre-deceased spouse under Section 2056(b)(7) which isn't reported on this return? If "Yes," include an explanation. 12. Yes Part 5 – Recapitulation Gross estate (a) Alternate value (b) Value at date of death 15. Schedule A – Real estate. 15. Schedule B – Stocks and bonds 15. Schedule C – Mortgages, notes, and cash 15. Schedule D – Insurance on the decedent's life [include Form(s) 712]. 15. Schedule E – Jointly owned property. 15. Schedule F – Other miscellaneous property 15. Schedule F – Other miscellaneous property 15. Schedule F – Other miscellaneous property 15. Schedule G – Transfers during decedent's life. 15. Schedule H – Powers of appointment. 15. Schedule H – Oqualified conservation essement exclusion. 15. Schedule H – Oqualified conservation essement exclusion. 15. Schedule H – Wortgages and lens. 15. Schedule H – Wortgages and lens. 15. Schedule H – Wortgages and lens.	b	. If yes, was the value	of any in	terest owned (from 7a) discounted o	n this estate	e tax re	turn? If yes, see the federal			ı
Section 2035, 2036, 2037, or 2038? (Scheduled G) 9. Were there in existence at the time of the decedent's death: a. Any trusts created by the decedent during his or her lifetime? (Schedule G and trust document). b. Any trusts not created by the decedent under which the decedent possessed any power, beneficial interest, or trusteeship? (Schedule F and trust document). 9a. Yes 10. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule H) 11. Was the decedent, immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule I? (Schedule I). 12. 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) which isn't reported on this return? If "Yes," include an explanation. Part 5—Recapitulation Gross estate (a) Alternate value (b) Value at date of death 501. Schedule A—Real estate. 502. Schedule B—Stocks and bonds. 503. Schedule B—Stocks and bonds. 504. Schedule B—Stocks and bonds. 505. Schedule E—Jointly owned property. 506. Schedule E—Jointly owned property. 507. Schedule E—Jointly owned property. 508. Schedule E—Jointly owned property. 509. Schedule E—Other miscellaneous property. 509. Schedule E—Other miscellaneous property. 509. Schedule I—Annuities 510. Total gross estate less exclusion (line \$10 minus line \$11). Enter here and on part 2, line 1 511. Schedule K—Debts of the decedent is life include from \$10 minus line \$11). Enter here and on part 2, line 1 512. Total gross estate less exclusion line \$16 (see instructions). 513. Schedule K—Debts of the decedent is life (see instructions). 514. Schedule K—Debts of the decedent in the semination in administering property subject to claims. 515. 516. Total of lines \$13 through \$15. 517. Allowable amount of deductions from line \$16 (see instructions)		instructions on report	ing the t	otal accumulated or effective discou	unts taken o	n Sche	dule F or G	• 7b.		Yes
9. Were there in existence at the time of the decedent's death: a. Any trusts created by the decedent during his or her lifetime? (Schedule G and trust document)			•							ı
a. Any trusts created by the decedent during his or her lifetime? (Schedule G and trust document)	S	Section 2035, 2036, 203	37, or 20	38? (Schedule G)				8.		Yes
b. Any trusts not created by the decedent under which the decedent possessed any power, beneficial interest, or trusteeship? (Schedule F and trust document)										ı
0. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule F) 11. Was the decedent, immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule 1? (Schedule I) 12. Was the decedent ever beneficiary of a trust for which a deduction was claimed by the estate of a pre-deceased spouse under Section 2056(b)(7) which isn't reported on this return? If "Yes," include an explanation 12. 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) which isn't reported on this return? If "Yes," include an explanation 12. Yes 13. Alternate value 14. Alternate value 15. Schedule A – Real estate. 15. Schedule B – Stocks and bonds 15. Schedule B – Stocks and bonds 15. Schedule B – Stocks and cash 15. Schedule E – Jointly owned property. 15. Schedule E – Transfers during decedents life. 15. Schedule A – Real estate less exclusion (line 510 minus line 511). 15. Schedule I – Powers of appointment. 15. Schedule I – Qualified conservation easement exclusion. 15. Schedule I – Powers and expense and expense incurred in administering property subject to claims. 15. Schedule I – Detections 15. Schedule K – Debts of the decedent. 15. Schedule K – Deb	а	. Any trusts created by	the dec	edent during his or her lifetime? (Sc	hedule G ar	d trust	document)	• 9a.		Yes
10. Did the decedent ever possess, exercise, or release any general power of appointment? (Schedule H)	b	. Any trusts not created	d by the	decedent under which the deceden	t possessed	any po	ower, beneficial interest,			ı
general power of appointment? (Schedule H)		or trusteeship? (Sche	dule F a	nd trust document)				9b.		Yes
11. Was the decedent, immediately before death, receiving an annuity described in the "General" paragraph of the instructions for Schedule I? (Schedule I)										ı
11.	g	eneral power of appoir	ntment?	(Schedule H)				• 10.		Yes
12. 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) which isn't reported on this return? If "Yes," include an explanation	11. V	Vas the decedent, imm	ediately	before death, receiving an annuity of	lescribed in	the "Ge	eneral" paragraph of the instructions	_		ı
under Section 2056(b)(7) which isn't reported on this return? If "Yes," include an explanation		•	,							Yes
Part 5—Recapitulation Gross • state (a) Alternate value (b) Value at date of death 501. Schedule A—Real estate								_		ı
Caross estate				sn't reported on this return? If "Yes,	" include an	explan	nation	12.		Yes
501. Schedule A—Real estate		-	on			(-)	Allowed a solve			
502. Schedule B – Stocks and bonds 502. .00 .00 503. Schedule C – Mortgages, notes, and cash 503. .00 .00 504. Schedule D – Insurance on the decedent's life [include Form(s) 712] 504. .00 .00 505. Schedule E – Jointly owned property 505. .00 .00 506. Schedule F – Other miscellaneous property 506. .00 .00 507. Schedule G – Transfers during decedent's life						(a)		ue at date		
503. Schedule C — Mortgages, notes, and cash 503. .00 .00 504. Schedule D — Insurance on the decedent's life [include Form(s) 712]					_					
504. Schedule D — Insurance on the decedent's life [include Form(s) 712]										
505. Schedule E—Jointly owned property		_								
506. Schedule F—Other miscellaneous property					_					
507. Schedule G — Transfers during decedent's life		•		• •	_					
Schedule H — Powers of appointment					_					
Schedule I – Annuities			_		_					
510. Total gross estate (add lines 501 through 509)										
511. Schedule U—Qualified conservation easement exclusion										
512. Total gross estate less exclusion (line 510 minus line 511). Enter here and on part 2, line 1		-								
Enter here and on part 2, line 1					. 511.		* 0 0 -			• 0 0
Deductions 513. Schedule J—Funeral expenses and expense incurred in administering property subject to claims	512.				• 540		$\cap \cap \bullet$			0.0
513. Schedule J—Funeral expenses and expense incurred in administering property subject to claims	Dodu		τ 2, line	I	. 512.		* 0 0 -	Amoun		
514. Schedule K—Debts of the decedent			01/2000	a and average incomed in administ		مناطب میاداد	est to eleime	74110411		. 00
515. Schedule K – Mortgages and liens			•	•	0	, ,	_			
516. Total of lines 513 through 515							_			
517. Allowable amount of deductions from line 516 (see instructions) 517. 518. Schedule L—Net losses during administration 518. 519. Schedule L—Expenses incurred in administering property not subject to claims 519. 520. Schedule M—Bequests, etc., to surviving spouse (see instructions) or Oregon Schedule OR-OSMP 520. 521. Schedule O—Charitable, public, and similar gifts and bequests 521.		- ·	-				_			
518. Schedule L—Net losses during administration			-							
519. Schedule L—Expenses incurred in administering property not subject to claims				` ,			_			
520. Schedule M—Bequests, etc., to surviving spouse (see instructions) or Oregon Schedule OR-OSMP 520. Schedule O—Charitable, public, and similar gifts and bequests										
521. Schedule O—Charitable, public, and similar gifts and bequests										
OZII. Odriedale o Criantable, pablio, and similar girle and bequeste										
222 Iniai negucuons (and lines 517 inrollon 521) lenter nere and on part 2 line 21 5 522 5 522 5 522 5	522.						_			.00