

Data Entry Worksheet - Life Estate Reserved (52)

Advisor Name: _____	Firm: _____
Street Address: _____	City: _____ State: ____ ZIP: _____
Phone: _____	Fax: _____ Email: _____
Donor(s) Name(s): _____	

Gift Date: ____/____/____ (Date of deed transfer)	
Life Estate Type: (Number of beneficiaries)	1 Life 2 Lives
Name and birth date of each trust beneficiary?	
1. _____	DOB ____/____/____
2. _____	DOB ____/____/____

Property Value: \$ _____ (Fair market value of personal residence or farm)
Building Value: \$ _____ (Of the property value, how much relates to the building?)
Land Value: \$ _____ (Of the property value, how much relates to the land?)
Useful Life: _____ (Estimated number of years of building use after contribution date. If unknown, enter 45 as default.)
Salvage Value: \$ _____ (Expected value of building at end of useful life. If unknown, enter 20% of building value as default.)

Income tax bracket of donor(s)?				
37%	35%	32%	24%	22%
12%	10%	Other _____		
Capital gains rate of donor(s)?				
23.8%	18.8%	15%	Other _____	