

Data Entry Worksheet - Bequest / Bequest of IRA (58)

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

Gift Date: ____/____/_____
(Date of death, estimated or actual)

Testator Name: _____

Testator Age: _____

Estate Size: \$ _____
(Fair market value of estate at time of death)

Bequest Amount: \$ _____
(Amount that will be distributed to charity upon testator's death)

Estate Costs: _____%
(Estimated probate and administration costs, e.g., 2%)

Bequest of IRA Option:

No - Not a Bequest of IRA

Yes - Bequest of IRA

GSTT Exemption: \$ _____

Percent to Grandchildren: _____%

Income tax bracket of heirs?

37% 35% 32% 24% 22%
12% 10% Other _____