

COMPREHENSIVE ESTATE TAX REPORT

**Richard & Cheryl Tobasco
Retirement With LTC Policy**

Date: May 12, 2016 Under Simple Will	Richard Predeceasing Cheryl		Cheryl Predeceasing Richard	
	Richard's Estate	Cheryl's Estate	Cheryl's Estate	Richard's Estate
Individually Held Assets	856,519	2,354,380	2,354,380	856,519
Share from Joint Assets	91,666	183,333	91,666	183,333
Life Insurance Proceeds	800,000	0	0	800,000
Assets Received from Spouse	0	1,656,518	0	1,972,887
Gross Estate	1,748,185	4,194,231	2,446,046	3,812,739
Own Liabilities	0	381,492	381,492	0
Adjusted Gross Estate	1,748,185	3,812,739	2,064,554	3,812,739
Marital Deduction	1,748,185	0	2,064,554	0
Taxable Estate	0	3,812,739	0	3,812,739
Total Taxable Amount	0	3,812,739	0	3,812,739
Fed Tax Before Credit	0	1,470,896	0	1,470,896
Unified Tax Credit	0	1,470,896	0	1,470,896
Combined Tax		0		0