

NOTICE OF INHERITANCE TAX
APPRAISEMENT, ALLOWANCE OR DISALLOWANCE
OF DEDUCTIONS AND ASSESSMENT OF TAX

POWELL III JAMES J
527 LINDEN ST
SCRANTON PA 18503-1605

DATE 12-05-2016
ESTATE OF ALLEN WILLIAM P
DATE OF DEATH 08-02-2012
FILE NUMBER 35 12-0944
COUNTY LACKAWANNA
ACN 502
APPEAL DATE: 02-03-2017
(See reverse side under Objections)

Amount Remitted
MAKE CHECK PAYABLE AND REMIT PAYMENT TO:
REGISTER OF WILLIS
507 LINDEN STREET STE 400
SCRANTON PA 18503

CUT ALONG THIS LINE → RETAIN LOWER PORTION FOR YOUR RECORDS ←
REV-1547 EX AFP (11-14) NOTICE OF INHERITANCE TAX APPRAISEMENT, ALLOWANCE OR
DISALLOWANCE OF DEDUCTIONS AND ASSESSMENT OF TAX

ESTATE OF: ALLEN WILLIAM P FILE NO.: 35 12-0944 ACN: 502 DATE: 12-05-2016

TAX RETURN WAS: (X) ACCEPTED AS FILED () CHANGED

APPRAISED VALUE OF RETURN BASED ON: LITIGATION RETURN

1. Real Estate (Schedule A)	(1)	<u>.00</u>	NOTE: To ensure proper credit to your account, submit the upper portion of this form with your tax payment.
2. Stocks and Bonds (Schedule B)	(2)	<u>.00</u>	
3. Closely Held Stock/Partnership Interest (Schedule C)	(3)	<u>.00</u>	
4. Mortgages/Notes Receivable (Schedule D)	(4)	<u>.00</u>	
5. Cash/Bank Deposits/Misc. Personal Property (Schedule E)	(5)	<u>15,927.48</u>	
6. Jointly Owned Property (Schedule F)	(6)	<u>.00</u>	
7. Transfers (Schedule G)	(7)	<u>.00</u>	
8. Total Assets	(8)	<u>15,927.48</u>	

APPROVED DEDUCTIONS AND EXEMPTIONS:

9. Funeral Expenses/Adm. Costs/Misc. Expenses (Schedule H)	(9)	<u>1,600.00</u>	
10. Debts/Mortgage Liabilities/Liens (Schedule I)	(10)	<u>.00</u>	
11. Total Deductions	(11)	<u>1,600.00</u>	
12. Net Value of Tax Return	(12)	<u>14,327.48</u>	
13. Charitable/Governmental Bequests; Non-elected 9113 Trusts (Schedule J)	(13)	<u>.00</u>	
14. Net Value of Estate Subject to Tax	(14)	<u>14,327.48</u>	

NOTE: If an assessment was issued previously, Lines 14, 15, 16, 17, 18 and/or 19 will reflect figures that include the total of all returns assessed to date.

ASSESSMENT OF TAX:

15. Amount of Line 14 at spousal rate	(15)	<u>.00</u> x 00 =	<u>.00</u>
16. Amount of Line 14 taxable at lineal rate	(16)	<u>14,327.48</u> x 045 =	<u>644.74</u>
17. Amount of Line 14 at sibling rate	(17)	<u>.00</u> x 12 =	<u>.00</u>
18. Amount of Line 14 taxable at collateral rate	(18)	<u>.00</u> x 15 =	<u>.00</u>
19. Principal Tax Due	(19)	=	<u>644.74</u>

TAX CREDITS:

PAYMENT DATE	RECEIPT NUMBER	DISCOUNT (+) INTEREST/PEN PAID (-)	AMOUNT PAID
07-21-2016	LC023680	.00	644.74

TOTAL TAX PAYMENT	644.74
BALANCE OF TAX DUE	.00
INTEREST AND PEN.	.00
TOTAL DUE	.00

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DATE 12-05-2016
ESTATE OF ALLEN WILLIAM P
DATE OF DEATH 08-02-2012
FILE NUMBER 35 12-0944
COUNTY LACKAWANNA
ACN 501
APPEAL DATE: 02-03-2017
(See reverse side under Objections)

Amount Remitted
MAKE CHECK PAYABLE AND REMIT PAYMENT TO:
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SCRANTON PA 18503

CUT ALONG THIS LINE → RETAIN LOWER PORTION FOR YOUR RECORDS ←
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DISALLOWANCE OF DEDUCTIONS AND ASSESSMENT OF TAX

ESTATE OF: ALLEN WILLIAM P FILE NO.: 35 12-0944 ACN: 501 DATE: 12-05-2016

TAX RETURN WAS: (X) ACCEPTED AS FILED () CHANGED

APPRAISED VALUE OF RETURN BASED ON: LITIGATION RETURN

1. Real Estate (Schedule A)	(1)	<u>.00</u>	NOTE: To ensure proper credit to your account, submit the upper portion of this form with your tax payment.
2. Stocks and Bonds (Schedule B)	(2)	<u>.00</u>	
3. Closely Held Stock/Partnership Interest (Schedule C)	(3)	<u>.00</u>	
4. Mortgages/Notes Receivable (Schedule D)	(4)	<u>.00</u>	
5. Cash/Bank Deposits/Misc. Personal Property (Schedule E)	(5)	<u>61,713.52</u>	
6. Jointly Owned Property (Schedule F)	(6)	<u>.00</u>	
7. Transfers (Schedule G)	(7)	<u>.00</u>	
8. Total Assets	(8)	<u>61,713.52</u>	

APPROVED DEDUCTIONS AND EXEMPTIONS:

9. Funeral Expenses/Adm. Costs/Misc. Expenses (Schedule H)	(9)	<u>6,170.00</u>	
10. Debts/Mortgage Liabilities/Liens (Schedule I)	(10)	<u>.00</u>	
11. Total Deductions	(11)	<u>6,170.00</u>	
12. Net Value of Tax Return	(12)	<u>55,543.52</u>	
13. Charitable/Governmental Bequests; Non-elected 9113 Trusts (Schedule J)	(13)	<u>.00</u>	
14. Net Value of Estate Subject to Tax	(14)	<u>55,543.52</u>	

NOTE: If an assessment was issued previously, Lines 14, 15, 16, 17, 18 and/or 19 will reflect figures that include the total of all returns assessed to date.

ASSESSMENT OF TAX:

15. Amount of Line 14 at spousal rate	(15)	<u>.00</u> x 00 =	<u>.00</u>
16. Amount of Line 14 taxable at lineal rate	(16)	<u>55,543.52</u> x 045 =	<u>2,499.46</u>
17. Amount of Line 14 at sibling rate	(17)	<u>.00</u> x 12 =	<u>.00</u>
18. Amount of Line 14 taxable at collateral rate	(18)	<u>.00</u> x 15 =	<u>.00</u>
19. Principal Tax Due	(19)		<u>2,499.46</u>

TAX CREDITS:

PAYMENT DATE	RECEIPT NUMBER	DISCOUNT (+) INTEREST/PEN PAID (-)	AMOUNT PAID
06-06-2016	LC023490	.00	2,499.46

TOTAL TAX PAYMENT	2,499.46
BALANCE OF TAX DUE	.00
INTEREST AND PEN.	.00
TOTAL DUE	.00