

## APPLICATION FOR INHERITANCE TAX CONSENTS

(For Resident Estates Only)

Mail the Application to:  
**WILLIAM G. CLARK**  
 Attorney General  
 Springfield, Illinois

(NOTE:—Prepare this affidavit with great care so that it will show in a general way whether there is any Inheritance Tax due in the State and if so, approximately how much. Give full information regarding the matters suggested by the form so there will be no necessity for returning it.)  
 This form may be used whether there is or is not administration of the estate.

The answers to some of the questions contained in this Affidavit call for legal advice which can properly be given only by an Attorney.

TO THE ATTORNEY GENERAL AND STATE TREASURER OF THE STATE OF ILLINOIS:

STATE OF ILLINOIS }  
Piatt COUNTY, } ss.

In the Matter of the Estate of Ara C. Waggoner Deceased.  
Albert J. Waggoner (Print or use Typewriter)  
 (Name of Affiant) of the City of Cerro Gordo

and State of Illinois, being first duly sworn on oath states:

1. That said decedent died on the 22nd day of February, 1966, a resident of the County of Piatt, State of Illinois, leaving ~~xxx~~<sup>no</sup> last Will and Testament, and left surviving as her only heirs at law:  
 (Trace the relationship of grandchildren, nieces, nephews and cousins.  
 (Thus A, son of B, a brother of decedent) and otherwise show the STIRPES.)

NAME	AGE	RELATIONSHIP TO DECEDENT	NAME	AGE	RELATIONSHIP TO DECEDENT
<u>Albert J. Waggoner</u>	<u>68</u>	<del>Widow</del> (Surviving Husband)			
<u>Jerry M. Waggoner</u>	<u>36</u>	<u>Son</u>			

2. That said decedent, in and by said last Will and Testament, made devises and bequests as follows, and none other:  
 (If the Will gives any property to anyone for life, or in trust, a true copy of the Will must be attached hereto.)

NAME OF BENEFICIARY	AGE	RELATIONSHIP TO DECEDENT	NATURE (Personalty, Money or Real Estate)	ESTIMATED VALUE
<u>Albert J. Waggoner</u>	<u>68</u>	<u>Husband</u>	<u>Entire Estate</u>	<u>None</u>
<u>All assets in joint tenancy between decedent and her husband</u>				

**No administration necessary. All assets in joint tenancy with surviving husband**

3. That \_\_\_\_\_ (NAME) \_\_\_\_\_ (ADDRESS)

expects to act } as \_\_\_\_\_ by order of the Circuit Court of \_\_\_\_\_  
 is now acting } (Executor or Administrator)  
 County, Illinois, and that, if now acting, he gave bond in the sum of \$ \_\_\_\_\_ approved by said Court.

4. That the gross full fair market value of all the **personal property** individually owned by decedent in this and every other State and County at death was \$ None and consisted of \_\_\_\_\_

(Cash, notes, accounts, stocks, bonds, chattels, etc.-attach schedule if necessary)

5. That the gross full fair market value of all **real estate** and interests therein individually owned by decedent at death, situated in Illinois was \$ None and consisted of the following: \_\_\_\_\_

(State whether improved, or unimproved and indicate Post Office Address)

6. That the decedent (did) (did not) own any Illinois real estate or personal property in joint tenancy with another or others, and (had) (did not have) bank deposit(s) in his name jointly with another or others and payable to the survivor(s). If so, itemize below:

Description of	Full Value of property	Value of Decedent's interest	Name Survivor(s) Relationship
<u>6 room Modern Home House in Cerro Gordo, Ill. Mutual Home &amp; Savings Assn. Decatur, Ill. #O.P. 772</u>	<u>14,000.00</u>	<u>7,000.00</u>	<u>Albert J. Waggoner, husband</u>
<u>Security Savings &amp; Loan Assn</u>	<u>8,521.24</u>	<u>4,260.62</u>	<u>Albert J. Waggoner, husband</u>
<u>Citizens National Bank</u>	<u>4,047.71</u>	<u>2,023.86</u>	<u>Albert J. Waggoner, husband</u>
<u>Agreement for Deed with Geo. Huckstep</u>	<u>769.29</u>	<u>384.64</u>	<u>Albert J. Waggoner, husband</u>
	<u>6,425.83</u>	<u>3,212.92</u>	<u>Albert J. Waggoner, husband</u>
		<u>1400.00</u>	

7. That decedent's known personal indebtedness **not** secured by real estate is \$ \_\_\_\_\_.

8. That decedent's Illinois real estate (individually owned) (jointly owned) is encumbered to the amount of \$ None.

9. Further, this affiant deposes and answers the following questions:

- a. Did decedent, during his last illness or within two years prior to his death, make any gifts or transfers of property (real or personal) or interest therein? (Answer) No. If so, give date, and estimated value thereof, together with the name and relationship to decedent of the donee or transferee. (Answer) \_\_\_\_\_
- b. Did decedent at any time make any transfers of property (real or personal), reserving any interest therein? (Answer) No. If so, give date and estimated value thereof, together with the name and relationship to decedent of the donee or transferee. (Answer) \_\_\_\_\_
- c. Did decedent exercise by Will any Power of Appointment derived from the disposition of property by Will, Deed, or other instrument of another? (Answer) No. If so, state fair market value of property and to whom the property was appointed. (Answer) \_\_\_\_\_

10. Consent is requested for the transfer of the following deposits of money standing in the name of said decedent, except as otherwise stated.

Name and Address of Bank or Institution	Amount of Deposit	Name of Joint Owner(s)
The Citizens National Bank, Decatur, Illinois	769.29	Albert J. Waggoner
Mutual Home and Savings Assn. Decatur, Ill. Acct. No. O.P.772	8521.24	Albert J. Waggoner
Security Savings and Loan Assn. Decatur, Ill. Acct. No. 0-648	4047.71	Albert J. Waggoner

11. Consent is requested for the transfer of the following shares of stock or registered bonds of corporations, which stood and now stand on the books of the corporations named, in the name of this decedent, except as otherwise stated:

Name of Corporation	How Many Shares or Bonds	Serial or Certificate Number	Market Value as of date of death	Name of Joint Owner(s)

12. Consent is requested for the delivery of certain property, envelopes, packages, or papers, or the contents of Safety Deposit Box, or boxes, which affiant states the following institutions, or persons had at the date of decedent's death and now have in its or their possession or control and belonging to or standing in the name of said decedent at the time of his death, except as otherwise stated:

Name and address of Bank, Safe Deposit Company, or other Institutions or Persons	List the number of each Safety Deposit Box — indicate nature of property held (whether Safety Deposit Box, or envelope, etc.)
The Citizens National Bank, Decatur, Illinois	Safety deposit Box 2191-H

(NOTE:—If the representatives of the estate desire to examine the contents of any Safety Deposit Box before preparing this affidavit, the Attorney General will, upon request by letter, wire or telephone, send to the Bank consent to open the Box, and will appoint someone, usually an officer of the Bank, to represent the State when the Box is opened and to make a list of the contents of the box for the Attorney General. Where this has been done before filing this Application, it is advisable to call attention to that fact in Par. 12 above).

13. That INHERITANCE TAX PROCEEDINGS in this State

- Are now pending in \_\_\_\_\_ County, Illinois
- Will be instituted soon in \_\_\_\_\_ County, Illinois
- Are not contemplated for the reason that exemptions are adequate so this proceeding will not be necessary

(NOTE—If the matter of Inheritance Tax has been determined, and the tax, if any, paid, affiant must submit an affidavit to that effect, giving full information as to when and where such proceedings were had and whether the property for which consent to transfer is desired, was included in the proceedings; and in such case this form of affidavit is unnecessary)

P. O. Box 329 Signature of Affiant  
329 Oakley Rd, Cerro Gordo, Illinois  
 Post Office and Street Address

Subscribed and Sworn to  
 before me this 28th  
 day of February, 19 66

Notary Public  
 (NOTARIAL SEAL)

Signature and Address of person other than affiant preparing this affidavit

Signature  
146 E. Main St., Decatur, Illinois  
 Address

The name and address of the Attorney for this estate is: Walden, Williams & Cole  
146 E. Main St., Decatur, Illinois