

Mr. Yox copy

SURROGATE'S COURT

County of Erie

In the Matter of the Appraisal under the Estate
Tax Law of the Estate of

FLORENCE BERTHA YOX

Deceased.

STATE OF NEW YORK

COUNTY OF Erie } ss.:

WILLIAM SHERWOOD YOX

above named decedent, being duly sworn in this proceeding for the determination of the tax, if any, to be paid upon the assets of the said estate under Article 10-C of the Tax Law, deposes and says that as such ~~administrator~~ ~~executor~~ ~~deponent~~ ~~is~~ personally familiar with the affairs of said estate, the property constituting the assets thereof, their fair market value, and the debts, expenses and charges properly allowable as deductions therefrom, and makes the following return:

GENERAL INFORMATION

- 1. Date of death June 12, 1964 2. Resident of Erie County
- 3. Did the decedent leave a will? (Answer "yes" or "no") Yes If the answer is "yes" attach copy of last will.
- 4. Letters ~~of administration~~ ~~testamentary~~ were issued on June 17, 1964 by the Surrogate's Court of Erie County.

5. The names and post-office addresses of the executor ~~of the estate~~ ~~is~~:

Name	Post Office Address
<u>WILLIAM SHERWOOD YOX</u>	<u>336 Shirley Avenue, Buffalo, N. Y.</u>

GROSS ESTATE

Answer all questions "yes" or "no" and submit appropriate schedule in each case where answer is "yes". Refer to instructions for each schedule in listing the assets.

SCHEDULE A—REAL ESTATE

6. Did the decedent at the time of death own any interest in real estate located within the State of New York? See SCHEDULE E.

SCHEDULE B—STOCKS AND BONDS

7. Did the decedent at the time of death own any stocks and bonds? See SCHEDULE E

SCHEDULE C—MORTGAGES, NOTES AND CASH

8. Did the decedent at the time of death own any mortgages, notes or cash? See SCHEDULE E

SCHEDULE D—INSURANCE

9. Was any insurance on life of decedent receivable by his estate? No.

10. Was any insurance on life of decedent receivable by beneficiaries other than the estate? Yes

SCHEDULE E—JOINTLY OWNED PROPERTY

11. Did the decedent at the time of his death own any property as a joint tenant or as a tenant by the entirety with right of survivorship or as community property? Yes

SCHEDULE F—OTHER MISCELLANEOUS PROPERTY

12. Did the decedent, at the time of death, own any interest in a co-partnership or unincorporated business? No

13. Did the decedent, at the time of death, own any miscellaneous property not returnable under any other schedule? No

SCHEDULE G—TRANSFERS DURING DECEDENT'S LIFE

14. Did the decedent during life make any transfer, including any transfer believed to be nontaxable, which the instructions with reference to Schedule G require to be reported? No

15. Was there in existence at the time of decedent's death any trust created by him during life? No

SCHEDULE H—POWERS OF APPOINTMENT

16. Did the decedent, at any time, possess, release or exercise any power of appointment? No

SCHEDULE I—ANNUITIES

17. Was any annuity or other payment receivable by any person surviving the decedent under an annuity contract or any similar contract or agreement, other than a policy of life insurance? No

DEDUCTIONS

SCHEDULE J—FUNERAL AND ADMINISTRATION EXPENSES

18. Itemize the funeral expenses and administration expenses in Schedule J.

SCHEDULE K—DEBTS OF DECEDENT

19. Itemize the debts of the decedent in Schedule K.

SCHEDULE L—MORTGAGES AND LIENS, AND NET LOSSES DURING ADMINISTRATION

20. List deductions claimed for these items in accordance with instructions.

SCHEDULE M—MARITAL DEDUCTION FOR TRANSFERS TO SURVIVING SPOUSE

21. Itemize in this schedule all interests in property transferred to decedent's surviving husband or wife, with respect to which a deduction is claimed.

SCHEDULE N—CHARITABLE, PUBLIC, AND SIMILAR GIFTS AND BEQUESTS

22. Itemize in Schedule N all devises and bequests to exempt corporations or associations.

SCHEDULE O—BENEFICIARIES

23. Give in Schedule O a statement of the names of all persons beneficially interested in the estate, the nature of their respective interests, etc.

I HEREBY CERTIFY THAT: No income tax deduction, either Federal or State, has been or will be claimed by the decedent or his estate, for a taxable year ending on or after December 31, 1960, on account of any administrative expenses, expenses of the decedent's medical care or casualty losses during administration, for which estate tax deductions are claimed herein.

Sworn to before me this
.....day of.....1964.

~~XXXXXXXXXX~~
Executor