

THIS FORM SHOULD BE USED ONLY IN ESTATES OF RESIDENT DECEDENTS

STATE OF NEW YORK

DEPARTMENT OF TAXATION AND FINANCE

GEORGE E. SEVERSON

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

LEONA D. SHIELDS

Deceased

Name of Attorney

**57 Woodcrest Drive
Scotia, New York 12302**

Address

FR 7 9612

Telephone Number

City of New York

County of **Schenectady**

ss.:

Francis J. Shields

, being duly sworn, says

in answer to the following:

1. Where do you reside? **11 Bellaire Drive, RD 1 Box 249, Scotia, N.Y. 12302**
2. What relation are you to the decedent? **Husband**
3. When did the decedent die? **April 23, 1969**
4. State the street address, city and county where the decedent resided at the time of death
11 Bellaire Drive, RD 1, Box 249, Scotia, N. Y. 12302
5. Did the decedent leave a will? **Yes** (If answer is yes, attach copy.)
6. Has an executor or an administrator of decedent's estate been appointed? If so, state name and address and attach certificate of appointment **No.**
7. Is it the intention of the persons interested to have an executor or administrator appointed for decedent's estate? **No. All joint assets.**
8. Have you made due and diligent search for all assets left by the decedent? **Yes**

LIST BELOW ALL ASSETS HELD INDIVIDUALLY, JOINTLY OR IN TRUST FOR ANOTHER
(IF DECEDENT DID NOT HAVE ANY SUCH ASSETS, WRITE "NONE")

If in joint names, as tenants
by the entirety, or as tenants
in common, so indicate.

9. REAL ESTATE

Full Address (street and number)	Assessed Value (at date of death)	Market Value (Less Mortgage if any at date of death)
11 Bellaire Drive Scotia, N. Y.	\$7,800.00	
	\$23,000.00 less 7,000.00 mtg.	\$16,000.00
TOTAL		

10. BANK DEPOSITS All accounts payable to either or survivor.

(name of bank and address)	Title of Account	Am't on Deposit (at date of death)
Schenectady Trust Co. Sch'dy Dec'd or Francis J. Shields		144.10
Schenectady Svgs Bnk.	"	3.86
"	"	684.15
1st Nat. Bank Scotia Scotia	"	211.51
Schenectady Trust Co. Sch'dy	or Francis J. Shields JR Son	11.20
"	or Leo Shields Son	5.80
"	or Mary Shields Daughter	6.00
"	or Dorothy Shields "	6.00
"	or Joseph Shields Son	35.39
TOTAL		\$ 1,108.01

11. U.S. GOVERNMENT BONDS

Quantity	Face Value	Series	If Joint or P.O.D. list beneficiaries	Market Value (at date of death)
NONE				
TOTAL				

12. STOCKS

No. of Shares
(com. or pref.)

Name of Corporation

Surviving Tenant
(if joint)Market Value
(at date of death)

&"

72 Sh. Common
90

General Electric

Francis J. Shields

\$6,480.00

TOTAL

13. PERSONAL PROPERTY IN SAFE DEPOSIT BOX, WAREHOUSE OR APARTMENT

Description of Property

Where Kept
(state name and address of
bank, warehouse, etc.)Market Value
(at date of death)

NONE NO BOX

TOTAL

14. INSURANCE POLICIES

Name of Company

Policy No.

Description
of Policy

Amount

Name and address of each named
beneficiary, relationship to de-
cedent, and amount payable to
such beneficiary. If payable to
estate, so indicate.

John Hancock

3925848

Life

\$2,300.00

Francis J. Shields
Husband

TOTAL

\$2,300.00

15. OTHER ASSETS

Description

Market Value
(at date of death)

Misc. personal effects and clothing of no market value

TOTAL

16. RECAPITULATION

REAL ESTATE	\$16,000.00
BANK DEPOSITS	1,108.01
BONDS	
STOCKS	6,480.00
PERSONAL PROPERTY	
INSURANCE	2,300.00
OTHER ASSETS	\$25,888.01
TOTAL	

All assets held jointly for
convenience. Interest of the
deceased is less than \$5,000.00.
See annexed affidavit.

17. Did the decedent dispose of any assets by gift within three years of death? **No.**
18. Did the decedent have an interest in any business at the time of his death? **No.**
19. Did the decedent hold any property in trust for or jointly with another? **No except accounts in #10.**
20. State total amount of funeral expenses **\$2,000.00**

21. PERSONS ENTITLED TO SHARE IN THE ESTATE

Name	Address	Relation to Decedent	Amount of Interest
Francis J. Shields	11 Bellaire Dr. Scotiam N.Y.	Husband	Entire except for small bank accs for children totaling \$64.39, set up in item 10

The undersigned further says that the foregoing sets forth all of the assets constituting the decedent's gross estate, that this affidavit is made to induce the State Tax Commission of the State of New York to give a waiver of notice required by the Tax Law knowing that it relies thereon, and that the answers herein contained to the foregoing questions are each and every one of them true in every particular, **and request is made for release of lien of realty, description attached.**

SIGN HERE

Francis J. Shields

Sworn to before me this 9th

day of May 19 69

Ernest E. Swenson
(Notary Public or Commissioner
of Deeds—no seal required)

NOTICE: Section 249-v of the Tax Law provides for a fine or imprisonment or both in case the deponent makes a false or fraudulent return or fraudulently withholds information with intent to evade taxation.