



## IRS Estate Tax Burden Survey

### Welcome to the IRS Estate Tax Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to the federal estate tax return filed in calendar year 2021 for the .

At any time you can leave the survey and come back to complete it. The survey will pick up after the last page you completed.

If you need this information again or have technical difficulties, please contact us at 1-800-627-2703 or via email at [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov).

You can find a Frequently Asked Questions (FAQ) document and a copy of the full survey in links below. These links will be available throughout the survey.

Privacy Act and Paperwork Reduction Act Notice for Estate Tax Burden Model Data Collection Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. §§ 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfill the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 15 to 20 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

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### Tax Preparation Methods & Activities

As the executor of the estate, which of the following methods did you use to prepare the federal estate tax return filed in Calendar Year 2021 for the ?

Did you use...

A tax preparer (e.g., a CPA, accountant, bookkeeper, any lawyer, an enrolled agent, registered tax preparer)?

- Yes
- No
- Don't Know

Accounting and/or financial software (e.g. QuickBooks Pro™, SAGE®)?

- Yes
- No
- Don't Know

Tax preparation software (e.g., BNA Estate & Gift Tax 706 Preparer™, CCH®, ProSystem fx®, ONE SOURCE™, custom software)?

- Yes
- No
- Don't Know

Any other method(s)?

- Yes (please describe)

- No
- Don't Know

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### Tax Related Recordkeeping

Please think about the tax-related recordkeeping activities you conducted for the during calendar year 2021. Tax-related recordkeeping includes all the activities you did to create, maintain, and store records needed to complete the federal estate tax return. For each recordkeeping system below, indicate whether you used it in calendar year 2021 to keep track of the estate's tax-related records.

Did you use ...

General recordkeeping software products such as Microsoft®, IBM Notes, OpenOffice?

- Yes
- No
- Don't Know

A checking or investment account statements from which estate expenses were paid?

- Yes
- No
- Don't Know

A separate hard-copy ledger?

- Yes
- No
- Don't Know

Any other tax-related recordkeeping system during Calendar Year 2021?

- Yes (please describe)

- No
- Don't Know

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### Gathering Materials, Learning About Tax Law, and Using IRS Taxpayer Service

Consider the tax-related materials you gathered and how you learned about tax laws to complete the federal estate tax return for the .

During Calendar Year 2021, did you obtain forms, publications or other materials from...

The IRS website?

- Yes
- No
- Don't Know

An IRS walk-in office?

- Yes
- No
- Don't Know

The IRS by either ordering them via mail or telephone?

- Yes
- No
- Don't Know

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During Calendar Year 2021, did you...

Review IRS tax forms and publications regarding how to complete the federal estate tax return?

- Yes
- No
- Don't Know

Attend tax seminars/training to learn about federal estate tax return reporting requirements?

- Yes
- No
- Don't Know

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Time Spent on Estate Tax-Related Activities

Think about all the **time you spent** on tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, calculating and depositing estimated tax payments, and completing, reviewing, and submitting the Calendar Year 2021 federal estate tax return for the .

How much time did you spend on the following activities for the federal estate tax return filed in Calendar Year 2021 for the ? If you're not sure, please provide your best estimate.

**Please include time spent:**

- On the Form 706 estate tax return as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the calendar year
- Corresponding or speaking with tax professional(s), if any

**Please do NOT include time spent:**

- By your tax professional(s)
- On any state estate tax return(s)
- On your federal, state, or local income tax returns
- On other types of returns
- Responding to IRS notices or correspondence

**You can enter hours and minutes. Enter minutes using decimals. For example:**

15 minutes = .25  
 30 minutes = .5  
 45 minutes = .75

**If you did not spend any time on the activity, enter Zero.**

|  | Hours                |
|--|----------------------|
| Enter the number of hours spent on tax recordkeeping, including reconciling financial and tax records  | <input type="text"/> |
| Enter the number of hours spent on tax Planning related to the federal estate tax return (Note: Do not include any tax planning related to the beneficiaries.) | <input type="text"/> |
| Enter the number of hours spent on gathering materials, learning about tax law, and using IRS or non-IRS resources   | <input type="text"/> |
| Enter the number of hours spent on calculating and depositing estimated tax payments   | <input type="text"/> |
| Enter the number of hours spent on completing, reviewing, and submitting the federal estate tax return   | <input type="text"/> |
| Enter the number of hours spent on all other federal estate tax-related activities   | <input type="text"/> |

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## IRS Estate Tax Burden Survey

### Costs Associated with Tax Compliance

Think about **how much money you spent** on tax preparation fees, tax software, and other federal estate tax return-related activities for the Calendar Year 2021 . Costs associated with tax compliance are a very important part of assessing burden, so please provide the most accurate estimate you can.

How much did you spend on each of the items below?

**If no money spent, please enter Zero**

Enter the amount you spent on a tax professional to prepare the federal estate tax return and related schedules filed in Calendar Year 2021?

\$

Enter the amount you spent on tax software to prepare the federal estate tax return filed in Calendar Year 2021?

\$

Enter the amount you spent on other tax activities related to the federal estate tax reporting requirements for Calendar Year 2021? This may include money spent on electronic submission, photocopies, tax research services, tax publications and journals, transportation, postage, or IRS user fees.

\$

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## IRS Estate Tax Burden Survey

## Additional Questions

How many state estate tax returns were filed in Calendar Year 2021 for the ? If you do not know the exact number, please provide your best estimate.

Enter number of state  
estate tax returns

Please describe below any suggestions you have for how the IRS could improve taxpayer service or reduce the compliance burden associated with the Form 706 estate tax return, and related forms, schedules, worksheets, and instructions.

What is the most difficult part of complying with the federal estate tax reporting responsibilities?

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## IRS Estate Tax Burden Survey

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Please click the "next" button below to submit your survey.

Once you submit your survey you will not be able to return to the survey.

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