Iowa Department of REVENUE

Iowa Inheritance Tax Schedule E

Jointly Owned Property

https://tax.iowa.gov

Estate of_____

Part I Qualified joint interest: Interests held by the decedent and their spouse as the only joint tenants.

Item Number	Description	Alternate Valuation Date	Alternate Value	Value at Date of Death

1(a) Totals.....$_____ $_____

1(b) Amounts included in gross estate including decedent's ½ value.
If less than 50%, provide proof of contribution. .....$_____ $_____

Part II All other joint interests

2(a) State the name, relationship and address of each surviving co-tenant. If there are more than three surviving co-tenants, then list the other co-tenants on an additional sheet.

Name	Relationship	Address (street, city, state, ZIP)
A.		
B.		
C.		

2(b) Percentage included must be 100%. If less than 100%, provide proof of contribution.

Item Number	Enter Letter for Co-tenant	Description (include alternate value date, if any)	Percentage Includable	Includable Alternate Value	Includable Value at Date of Death

2(c) Total other joint interests ..... $_____ $_____

Total includable joint interests. Add lines 1(b) and 2(c). ..... $_____ $_____

Enter totals on IA 706, page 2, line 30, Jointly Owned Property.

If more space is needed, include additional sheets.