

Transfer of Property Worksheet Use this worksheet to determine transfer of property periods.

Case Name:		Case Number:
Description of Transferred Assets:		
* For Multiple Transfers – Consider the total the total value of all transfers on and after 02		of all transfers prior to 02/08/2006 as a single transfer. Consider 2006 as a single transfer.
		nt transfer is executed or discovered during an existing penalty day following the last day of the existing period.
Step 1: Determine Uncompensated Value A. For All Transfers (except those involvin	g ann	nuities, contracts, loans, mortgages or promissory notes)
1. Fair Market Value of Asset		
2. Compensation Received		
Sale Price		
Debt Assumed by Purchaser	+	
Other Compensation	+	
Total Compensation		=
3. Encumbrances (include only those NOT	assur	med by purchaser in item 2 above)
Mortgages or Liens		
Other Encumbrances	+	
Total Encumbrances		
4. Total Uncompensated Value		=
 B. For Contract Sales, Loans, Notes and Market Value of Asset/Amount of Loans 		ges
2. Expected Compensation		
Life Expectancy of Client/Spouse		(based on current age)
Annual Reimbursement Expected	х	(convert to yearly amount)
Total Anticipated Compensation	=	
Total Payments to Date	+	
Debt Assumed by Purchaser	+	
Total Compensation Received		

Annuities otal Value of Annuity When Annuitized compensation Life Expectancy atAnnuitization Annual Reimbursement Expected X Total Compensation - otal Uncompensated Value = : Determine Penalty Period : Transfers Prior to 02/08/2006 al Uncompensated Value	C.	2. Compensation	nnuitized		=	
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Penalty Period For This Transfer:		to		_
	Month/Day/Year		Month/Day/Year	_
Name of person completing form:				
Date:	_			V
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