Calder & Wynn

ESTATE PLANNING ATTORNEYS

SAMPLE REPORT

November 17, 2026

New York estate tax estimate

A sample of what your clients download, prepared from the numbers they enter.

NEW YORK ESTATE TAX

$916,400

10.2% of the estate

FEDERAL ESTATE TAX

$0

Below the $15,000,000 federal exemption

NEW YORK EXEMPTION

$7,350,000

For a resident who leaves no spouse, 2026 schedule

STATES THAT WOULD TAX THIS ESTATE

12 of 13

Estate-tax states and DC

THE SAME ESTATE IN EVERY ESTATE-TAX STATE

State	Exemption	Estimated tax
Oregon	$1,000,000	$947,500
New York *	**$7,350,000**	**$916,400**
Washington	$3,000,000	$910,000
Rhode Island	$1,838,056	$828,460
Massachusetts	$2,000,000	$816,800
Illinois	$4,000,000	$801,049
Minnesota	$3,000,000	$780,000
Maryland	$5,000,000	$640,000
Vermont	$5,000,000	$640,000
District of Columbia	$4,988,400	$529,299
Hawaii	$5,490,000	$396,300

Maine	$7,160,000	$147,200
Connecticut	$15,000,000	$0

ASSUMPTIONS YOU ENTERED

Taxable estate	**$9,000,000**
State of residence	**New York**
Resident who leaves no spouse; 2026 schedules	

QUESTIONS TO TAKE TO YOUR TEAM

FOR YOUR CPA

- Which tax facts or filing rules could change this estimate?
- Which federal or state assumptions should be checked before I act?

FOR YOUR ATTORNEY

- Do any documents, ownership terms, or state laws change how this works?
- What should be reviewed before anything is signed or retitled?

FOR YOUR FAMILY

- Who in the family should understand this plan, and when should they hear about it?
- Does this keep things fair across children and heirs, and is fair the same as equal for us?

FOR YOUR FINANCIAL PLANNER

- How does this decision affect the rest of the household plan?
- What tradeoff could this create somewhere else in the plan?

NEXT STEP

Want to talk through these numbers?

A short, no-pressure conversation with Calder & Wynn.

Book a conversation or call (555) 010-2400

Learn more and pick a time at calderwynn.example

IMPORTANT INFORMATION

This report is an educational illustration based only on the numbers entered and the assumptions shown. It is not tax, legal, insurance, or investment advice, and it does not tell you to buy, sell, file, sign, gift, borrow, or change a plan.

The calculator does not know your full tax return, legal documents, health, family goals, business terms, other assets, or debts. A missing fact can change the answer. Most tools focus on federal rules; state tax and state law can change the result.

Future returns, costs, values, tax rates, and timing can change. A result is not a guarantee and may not match a tax form, appraisal, insurance quote, legal document, or full financial plan. Review any decision with qualified tax, legal, and financial professionals.

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