

22-Dec-16

**Number of Estate Tax Returns Filed and Percentage Taxable
by Size of Gross Estate, Filing Years 2001-2015**

Size of Gross Estate	2001		2002		2003		2004		2005	
	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable
Total	108,071	47.9	99,603	45.2	73,128	45.5	65,039	48.2	45,070	44.9
Under \$2 million	85,937	45.6	77,985	43.0	50,116	41.7	41,048	44.8	19,545	36.1
\$2.0 million under \$3.5 million	12,695	54.2	12,490	47.7	13,136	51.1	13,936	52.3	14,842	49.3
\$3.5 million under \$5.0 million	3,980	54.0	3,823	56.8	4,130	53.3	4,198	51.6	4,445	51.3
\$5.0 million under \$10.0 million	3,550	61.0	3,438	61.1	3,732	57.8	3,806	56.9	4,122	55.3
\$10.0 million under \$20.0 million	1,282	67.7	1,198	63.0	1,293	63.7	1,315	61.4	1,358	60.5
\$20.0 million or more	628	74.7	670	72.2	720	70.0	736	70.7	760	65.5

Size of Gross Estate	2006		2007		2008		2009	
	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable
Total	49,050	46.5	38,031	45.8	38,373	44.8	33,515	43.9
Under \$2.0 million	16,865	38.7	3,945	35.7	1,687	42.7	1,304	42.6
\$2.0 million under \$3.5 million	18,857	48.0	19,806	42.8	20,955	39.9	17,830	39.3
\$3.5 million under \$5.0 million	5,629	52.4	5,943	48.1	6,562	48.1	6,141	46.6
\$5.0 million under \$10.0 million	5,053	52.7	5,429	53.5	5,895	50.9	5,336	49.6
\$10.0 million under \$20.0 million	1,708	58.8	1,892	58.4	2,096	56.3	1,857	54.7
\$20.0 million or more	939	65.4	1,017	64.3	1,178	63.3	1,045	61.0

Size of Gross Estate	2010		2011	
	Number of returns	Percentage taxable	Number of returns	Percentage taxable
Total	15,191	44.2	4,588	32.3
Under \$3.5 million	3,306	40.1	601	29.0
\$3.5 million under \$5.0 million	5,027	38.0	990	28.1
\$5.0 million under \$10.0 million	4,439	47.4	2,110	31.0
\$10.0 million under \$20.0 million	1,526	54.1	563	38.7
\$20.0 million or more	892	60.9	324	48.1

Size of Gross Estate	2012	
	Number of returns	Percentage taxable
Total	9,412	39.7
Under \$5.0 million	988	33.5
\$5.0 million under \$10.0 million	5,804	36.4
\$10.0 million under \$20.0 million	1,723	46.3
\$20.0 million or more	896	55.2

Size of Gross Estate	2013		2014		2015	
	Number of returns	Percentage taxable	Number of returns	Percentage taxable	Number of returns	Percentage taxable
Total	10568	44.4	11931	43.2	11917	41.3
Under \$5.0 million	1053	40.6	1631	48.8	1387	47.9
\$5.0 million under \$10.0 million	6206	38.7	6735	36.1	6849	33.6
\$10.0 million under \$20.0 million	2158	53.8	2283	49.6	2325	49.5
\$20.0 million under \$50 million	854	59.5	938	61.6	958	56.4
\$50.0 million or more	297	64.0	345	64.6	398	66.8