



Monthly & Annual Gift Chart & Tax Information

Over 3 Years

Total Gift over 3 Years	Annually	Monthly	Tax Credit Based on 40%	Actual Cost of Gift	Actual Cost Annually	Actual Cost Monthly
\$500,000	\$166,667	\$13,889	\$200,000	\$300,000	\$100,000	\$8,333
\$320,000	\$106,667	\$8,889	\$128,000	\$192,000	\$64,000	\$5,333
\$200,000	\$66,667	\$5,556	\$80,000	\$120,000	\$40,000	\$3,333
\$150,000	\$50,000	\$4,167	\$60,000	\$90,000	\$30,000	\$2,500
\$125,000	\$41,667	\$3,472	\$50,000	\$75,000	\$25,000	\$2,083
\$100,000	\$33,333	\$2,778	\$40,000	\$60,000	\$20,000	\$1,667
\$75,000	\$25,000	\$2,083	\$30,000	\$45,000	\$15,000	\$1,250
\$50,000	\$16,667	\$1,389	\$20,000	\$30,000	\$10,000	\$833
\$25,000	\$8,333	\$694	\$10,000	\$15,000	\$5,000	\$417
\$15,000	\$5,000	\$417	\$6,000	\$9,000	\$3,000	\$250
\$10,000	\$3,333	\$278	\$4,000	\$6,000	\$2,000	\$167
\$7,500	\$2,500	\$208	\$3,000	\$4,500	\$1,500	\$125
\$5,000	\$1,667	\$139	\$2,000	\$3,000	\$1,000	\$83
\$2,500	\$833	\$69	\$1,000	\$1,500	\$500	\$42
\$1,500	\$500	\$42	\$600	\$900	\$300	\$25

Information in this document does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice. You should always seek professional legal, estate planning, and financial advice for you own personal financial situation before deciding on the course of action that is best for you.



Monthly & Annual Gift Chart & Tax Information

Over 5 Years

Total Gift over 5 Years	Annually	Monthly	Tax Credit Based on 40%	Actual Cost of Gift	Actual Cost Annually	Actual Cost Monthly
\$500,000	\$100,000	\$8,333	\$200,000	\$300,000	\$60,000	\$5,000
\$320,000	\$64,000	\$5,333	\$128,000	\$192,000	\$38,400	\$3,200
\$200,000	\$40,000	\$3,333	\$80,000	\$120,000	\$24,000	\$2,000
\$150,000	\$30,000	\$2,500	\$60,000	\$90,000	\$18,000	\$1,500
\$125,000	\$25,000	\$2,083	\$50,000	\$75,000	\$15,000	\$1,250
\$100,000	\$20,000	\$1,667	\$40,000	\$60,000	\$12,000	\$1,000
\$75,000	\$15,000	\$1,250	\$30,000	\$45,000	\$9,000	\$750
\$50,000	\$10,000	\$833	\$20,000	\$30,000	\$6,000	\$500
\$25,000	\$5,000	\$417	\$10,000	\$15,000	\$3,000	\$250
\$15,000	\$3,000	\$250	\$6,000	\$9,000	\$1,800	\$150
\$10,000	\$2,000	\$167	\$4,000	\$6,000	\$1,200	\$100
\$7,500	\$1,500	\$125	\$3,000	\$4,500	\$900	\$75
\$5,000	\$1,000	\$83	\$2,000	\$3,000	\$600	\$50

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