

SURROGATE'S COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

In the Matter of

Vicki R.C. Simon

Deceased.

TO BE FILLED OUT BY FIDUCIARY OR

ATTORNEY FOR

Total Estate Assets (see below)\*

Filing fee SCPA 2402(7)

Filing fee initially paid

Balance (Refund) Due

INVENTORY OF ASSETS (Rule 207.20)

File No: 2019-1564

The undersigned, a fiduciary or attorney for the fiduciary of the above Decedent's estate, certifies that the following constitutes the gross estate for tax purposes and identifies whether non-estate assets exist. Complete below according to the following value categories:

Category A - under \$10,000; Category B - \$10,000 to under \$20,000; Category C - \$20,000 to under \$50,000;  
Category D - \$50,000 to under \$100,000; Category E - \$100,000 to under \$250,000;  
Category F - \$250,000 to under \$500,000; Category G - \$500,000 or over.

Date of Death: 9/30/2018 Date of Letters: 8/12/2019 Type of Letters: Letters Of Administration

Name of Fiduciary(ies) and, if changed, fiduciary(ies) address: \_\_\_\_\_

ASSETS INDIVIDUALLY OWNED BY DECEDENT  
OR PAYABLE TO ESTATE

1. Real Estate
2. Stocks and Bonds
3. Insurance Payable to Estate
4. IRAs, 401Ks Payable to Estate
5. Mortgages or Notes Held by Decedent
6. Cash
7. Miscellaneous
8. Firearms  
(Check appropriate box)

CATEGORY

G  
G  
A or Ø  
A or Ø  
A or Ø  
C  
A

[ ] Yes - See attached Firearms Inventory form  
[  ] None

**\*TOTAL ESTATE ASSETS**

NON-ESTATE ASSETS - CHECK YES OR NO TO EACH OF THE FOLLOWING:

9. Living Trust  
If yes, set forth the Name of the Trustee(s)
10. Gifts in Excess of Federal Annual Exclusion  
Made Within 3 Years of Decedent's Death
11. Jointly Held Property (Real or Personal)
12. Insurance Payable to Beneficiary
13. IRAs, 401K's Payable to Beneficiary
14. Annuities
15. Powers of Appointment
16. Cause(s) of Action Pending  
If yes, identify Court and Index Number

Yes  No

Yes  No  
Yes  No  
Yes  No  
Yes  No  
Yes  No  
Yes  No  
Yes  No

Certified to be true on the 19<sup>th</sup> day of August, 2019

Claude Simon  
Signature

Claude Simon  
Print Name

Mel Ginsburg  
Attorney's Name

261 Madison Ave NY NY 10016  
Attorney's Address & Telephone No: 212 949 7300