

The following table is a reprint of page 64 from the book *A Broken Covenant: The Rape of the American Middle Class* (ISBN 0-9700890-0-7) by Stephen Rodnesky.

Table 21: **Comparison of Estate Tax Returns Filed, 1995-1997**

	Gross Estate for tax purposes		Percent Increase in Returns Over 1995 Total	Total \$ Amount Increase Over 1995 Total
	Total Number of Returns	Total Amount (times 1,000)		
TOTAL All Returns, 1995	69,755	\$117,697,788	0.00%	0.00%
\$600,000 under \$1,000,000	37,328	\$28,555,075		
\$1,000,000 under \$2,500,000	24,544	\$36,061,599		
\$2,500,000 under \$5,000,000	5,330	\$18,104,287		
\$5,000,000 under \$10,000,000	1,683	\$11,653,648		
\$10,000,000 under \$20,000,000	570	\$7,844,740		
\$20,000,000 or more	300	\$15,478,439		
TOTAL Taxable Returns, 1995	31,563	\$67,184,741	0.00%	0.00%
\$600,000 under \$1,000,000	13,827	\$11,193,040		
\$1,000,000 under \$2,500,000	12,712	\$18,851,171		
\$2,500,000 under \$5,000,000	3,298	\$11,288,952		
\$5,000,000 under \$10,000,000	1,105	\$7,767,464		
\$10,000,000 under \$20,000,000	390	\$5,366,376		
\$20,000,000 or more	231	\$12,717,737		
TOTAL All Returns, 1996	79,321	\$137,412,502	13.71%	16.75%
\$600,000 under \$1,000,000	42,262	\$32,478,040		
\$1,000,000 under \$2,500,000	28,441	\$41,890,828		
\$2,500,000 under \$5,000,000	5,712	\$19,303,241		
\$5,000,000 under \$10,000,000	1,871	\$12,751,403		
\$10,000,000 under \$20,000,000	663	\$9,103,094		
\$20,000,000 or more	372	\$21,885,895		
TOTAL Taxable Returns, 1996	37,711	\$80,373,494	16.30%	16.41%
\$600,000 under \$1,000,000	16,950	\$13,747,377		
\$1,000,000 under \$2,500,000	15,353	\$22,701,177		
\$2,500,000 under \$5,000,000	3,422	\$11,602,034	3.76%	2.77%
\$5,000,000 under \$10,000,000	1,213	\$8,337,767	9.77%	7.34%
\$10,000,000 under \$20,000,000	487	\$6,682,999	24.87%	24.53%
\$20,000,000 or more	286	\$17,302,139	23.81%	36.05%
TOTAL All Returns, 1997	90,006	\$162,250,712	25.53%	32.42%
\$600,000 under \$1,000,000	47,541	\$36,512,272		
\$1,000,000 under \$2,500,000	32,380	\$47,602,635		
\$2,500,000 under \$5,000,000	6,686	\$22,787,232		
\$5,000,000 under \$10,000,000	2,178	\$15,044,362		
\$10,000,000 under \$20,000,000	804	\$11,012,699		
\$20,000,000 or more	417	\$29,291,513		
TOTAL Taxable Returns, 1997	42,901	\$97,650,463	26.43%	31.20%
\$600,000 under \$1,000,000	19,006	\$15,315,682		
\$1,000,000 under \$2,500,000	17,606	\$26,066,118		
\$2,500,000 under \$5,000,000	3,954	\$13,567,471	19.89%	20.18%
\$5,000,000 under \$10,000,000	1,414	\$9,954,276	27.96%	28.15%
\$10,000,000 under \$20,000,000	592	\$8,097,443	51.79%	50.89%
\$20,000,000 or more	329	\$24,649,473	42.42%	93.82%
Final 1995 Estate Tax Figures	78,023	\$136,296,604		
Net Estate Tax Collected		\$14,293,834		

Projected Estate Tax Due 2009: \$101,138,964

Extracted from IRS report titled, "Federal Estate Tax Returns, 1995-1997," by Barry W. Johnson and Jacob M. Mikow, Table 1a-1c & Figure B.