

National Survey of Seniors on “The Death Tax”

A Special Project of the 60 Plus Association

ABOUT THIS SURVEY: This *Survey* is a key component of our campaign to mobilize seniors to help build support for passage of “*The Death Tax Repeal Act*” in the new 118th Congress. Its primary purpose is to back up our *Petition* campaign aimed at all 535 Members of the House and Senate urging each to support and vote for the Act. It further empathizes how angry and concerned seniors are about the unfair, cruel, and immoral Death Tax. **Please be sure to answer each question and thank you for your participation.**

1. Are you concerned about the financial stress the federal inheritance tax could impose on your family after they inherit your estate?

Yes No Not Sure

2. Have you hired a tax attorney to help you take measures to protect your estate and your family after your death?

Yes No Not yet, but I am planning to.

3. Does your state impose an inheritance or estate tax on top of the federal inheritance tax?

Yes No Not Sure

4. Are you aware that in 2026, the federal Death Tax exemption will drop back to its pre-2018 levels?

Yes No Not Sure

5. Are you aware that come 2026, there will be no law banning Congress from dropping the Death Tax exemption down to as low as zero?

Yes No Not Sure

6. Do you agree that a top priority of the new Republican-controlled House of Representatives is the re-introduction and passage of U.S. Representative Jason Smith’s “*Death Tax Repeal Act*”?

Yes No Not Sure

7. Would you be inclined in 2024 to vote against any Member of the House, Democrat or Republican, who does not support “*The Death Tax Repeal Act*”?

Yes No Not Sure

8. Would you be inclined to vote in 2024 against any Member of the Senate, Democrat or Republican, who does not support John Thune’s Senate version of “*The Death Tax Repeal Act*”?

Yes No Not Sure

9. Top Democrat leaders, from President Joe Biden on down, have made public their desire to dramatically lower the Death Tax exemption and increase the percentage of an estate’s value the government can tax. Do you fear they will act to do so in 2026 if they prevail in the 2024 Presidential and congressional elections?

Yes No Not Sure

10. Do you support 60 Plus’s 2023 Battle Plan to make passage of “*The Death Tax Repeal Act*” a major issue between now and the 2024 Presidential and congressional elections?

Yes No Not Sure

OPTIONAL Please add any additional thoughts, concerns, and/or suggestions you have for 60 Plus and our 2023 Battle Plan to pass “*The Death Tax Repeal Act*” as soon as possible after it is re-introduced in the House and Senate.

60 Plus Association’s mission is to fight for the issues that matter most to seniors, retirees and their families like protecting Social Security, access to quality medical care and permanently repealing the death tax.

A copy of the summary of the latest financial statement, or annual report, and registration filed by 60 Plus Association can be obtained by writing us at 2121 Eisenhower Ave, Suite 229, Alexandria, VA 22314. Residents of the following states may request financial statements and other information from the offices indicated (the toll free numbers are for use only within the respective states). California: 60 Plus Association’s audited financial statement is available upon request to 60 Plus Association. Florida: A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE, WITHIN THE STATE, 1-800-HELP-FLA (435-7352). Registration number CH2483. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. www.FloridaConsumerHelp.com. Georgia: Upon request, 60 Plus Association will provide a full and fair description of this and its other programs, and a financial statement or summary. Maryland: A copy of 60 Plus Association’s current financial statement is available on request to 60 Plus 2121 Eisenhower Ave, Suite 229, Alexandria, VA 22314 or calling 703-807-2070. For the cost of postage and copying, documents and information submitted under the Maryland Solicitations Act are available from the Maryland Secretary of State, Minnesota: Your name was initially on a list rented/acquired from another organization, which is how we find new supporters for our valuable work. By responding to this letter with a contribution or other involvement response to our organization, you consent and agree that we may add your name to a list to rent or use in a similar way. If you do not consent to your name being added to the rented list, please state so in writing with your full name and address to the address on the enclosed reply envelope. Mississippi: The official registration and financial information of 60 Plus Association may be obtained from the Mississippi Secretary of State’s office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement by the Secretary of State. New Jersey: INFORMATION FILED WITH THE ATTORNEY GENERAL CONCERNING THIS CHARITABLE SOLICITATION AND THE PERCENTAGE OF CONTRIBUTIONS RECEIVED BY THE CHARITY DURING THE LAST REPORTING PERIOD THAT WERE DEDICATED TO THE CHARITABLE PURPOSE MAY BE OBTAINED FROM THE ATTORNEY GENERAL OF THE STATE OF NEW JERSEY BY CALLING 1-973-504-6215 AND IS AVAILABLE ON THE INTERNET AT <http://www.njconsumeraffairs.gov/ocp/charities.htm>. REGISTRATION WITH THE ATTORNEY GENERAL DOES NOT IMPLY ENDORSEMENT. New York: Upon request, a copy of 60 Plus Association’s last annual report filed with the Attorney General is available from 60 Plus Association or from the New York State Attorney General’s Charities Bureau, Attn: FOIL Officer, 120 Broadway, New York, New York 10271; (212) 416-8401; <https://www.charitiesnys.com/>. North Carolina: Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989. The license is not an endorsement by the state. Pennsylvania: The official registration and financial information of 60 Plus Association may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement. Virginia: A financial statement is available from the State Division of Consumer Affairs in the Department of Agriculture and Consumer Services upon request. Washington: For additional information regarding 60 Plus Association’s activities or financial information, 60 Plus Association is registered with the Washington State Charities Program as required by law and information may be obtained by calling 800-332-4483 or 360-725-0378. West Virginia: West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement. Your generous donation is used for our tax-exempt mission, which may include educating the public, administrative, compliance and fundraising costs.