

Table 13.40-- TOP WEALTHHOLDERS: 1962 TO 2016

[Top wealthholders are defined as persons with a gross estate in excess of specified amounts.
All figures are estimates based on estate tax return samples]

Group and year	Number of top wealthholders	Millions of dollars		
		Total assets	Debts and mortgages	Net worth
Gross estate over \$60,000				
1962	11,323	1,908	231	1,677
1969	36,470	6,327	1,090	5,236
1972	53,700	7,866	1,369	6,497
Gross estate over \$120,000				
1976	39,000	7,436	1,546	5,890
Gross estate over \$325,000				
1982	20,300	14,767	3,523	11,244
Gross estate over \$500,000				
1982	8,700	10,864	2,919	7,946
1986	11,000	11,330	1,475	9,855
Gross estate over \$600,000				
1989	22,300	28,393	2,447	25,947
1992	32,280	39,198	3,543	35,655
1995	24,000	25,944	2,745	23,199
Gross estate over \$625,000				
1998	25,000	30,986	4,133	26,853
Gross estate over \$1 million				
1998 1/	7,000	21,163	1,745	19,418
2001 2/	13,000	33,729	4,342	29,387
Gross estate over \$1.5 million				
2004 2/	7,000	24,375	1,823	22,552
Gross estate over \$2.0 million				
2007 2/	7,000	78,954	3,353	75,601
Gross estate over \$5.0 million				
2013	826	13,379	313	13,066
Gross estate over \$5.45 million				
2016	956	14,014	677	13,337

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1/ Number of wealthholders of debts and mortgages is 5,000.

2/ For 2001, 'Total assets', in \$1,000, were 'Financial assets' of \$16,124, 'All real estate' of \$15,928, and 'All other assets' of \$1,677; in 2004, \$11,903, \$10,647, and \$1,825; in 2007, \$59,625, \$14,136, and \$5,193; and in 2013, \$13,379, \$3,823, and \$3,715 respectively.

Source: U.S. Internal Revenue Service, *Statistics of Income -1962, Personal Wealth* (1967), pp. 55-56; *Statistics of Income -1969, Personal Wealth* (1973), pp. 57-58; *Statistics of Income- 1972, Personal Wealth Estimated from Estate Tax Returns* (1976), table 33; and *Statistics of Income Bulletin, Summer 1983*, pp. 1-26, *Spring 1988*, pp. 31-46; *Spring 1990*, pp. 63-78; *Spring 1993*, pp. 105-121; *Winter 1997-98*, and *Winter 1999-2000*, Table 6. Also, <http://www.irs.ustreas.gov/prod/tax_stats/soi/soi_bul.html> and for 1995 <http://www.irs.treas.gov/prod/tax_stats/soi/est_pw.html/95PWART.EXE> accessed July 26, 2002; and *Winter 2002-2003 Issue, Personal Wealth 1998*, table 6 <<http://www.irs.ustreas.gov/pub/irs-soi/98pwart.pdf>> accessed September 28, 2003 and IRS Tax Stats "Top Wealthholders with Net Worth of \$1 Million or more by State of Residence: 1998", table 7, and Ibid. 2001, Table 6 <<http://www.irs.gov/taxstats/article/0,,id=225455,00.html>> accessed September 18, 2006; Personal Wealth 2004, Table 6 <<http://www.irs.gov/taxstats/article/0,,id=225455,00.html>> accessed August 25, 2008; Personal Wealth 2007, Table 6 <<https://www.irs.gov/uac/soi-tax-stats-personal-wealth-statistics>> accessed March 5, 2012; Personal Wealth 2013, Table 6 <<https://www.irs.gov/uac/soi-tax-stats-personal-wealth-statistics>> accessed January 18, 2018; Personal Wealth 2016, Table 6 <<https://www.irs.gov/statistics/soi-tax-stats-top-wealthholders-by-state-of-residence>> accessed June 17, 2021; and calculations by Hawaii State Department of Business, Economic Development & Tourism.