

POST-DEATH TAX RETURN INFORMATION SHEET

Estate & Deceased Taxpayer Filing Template

1. DECEASED TAXPAYER INFORMATION

FULL NAME OF DECEASED

SOCIAL SECURITY NUMBER / TAX ID

DATE OF BIRTH

DATE OF DEATH

LAST KNOWN ADDRESS

2. EXECUTOR / ADMINISTRATOR INFORMATION

FULL NAME OF EXECUTOR/ADMINISTRATOR

PHONE NUMBER

MAILING ADDRESS

EMAIL ADDRESS

COURT APPOINTMENT DATE (IF APPLICABLE)

3. FILING STATUS & TAX YEAR DETAILS

TAX YEAR OF RETURN

TYPE OF RETURN (E.G., FINAL INDIVIDUAL, ESTATE INCOME)

4. INCOME & ASSETS LOG (POST-DEATH)

| ✓ | SOURCE OF INCOME / ASSET DESCRIPTION | AMOUNT / VALUE (\$) |
|---|--------------------------------------|---------------------|
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5. DEDUCTIONS, LIABILITIES & ADMINISTRATIVE EXPENSES

| ✓ | DESCRIPTION OF EXPENSE/ DEDUCTION | AMOUNT PAID (\$) |
|---|-----------------------------------|------------------|
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6. SIGNATURES AND AUTHORIZATIONS

I, as the appointed Executor/Administrator of the Estate, declare under penalties of perjury that I have examined this information sheet and accompanying documents, and to the best of my knowledge, they are true, correct, and complete.

SIGNATURE OF EXECUTOR/ ADMINISTRATOR

DATE