

# INFORMATION RETURN FOR DECEASED TAXPAYER

Filing Template and Representative Statement

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TAX YEAR

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TYPE OF RETURN

Final Individual Return

Estate Income Tax Return

## 1. DECEASED TAXPAYER INFORMATION

FIRST NAME & MIDDLE INITIAL

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LAST NAME

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SOCIAL SECURITY / TAX ID NUMBER

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DATE OF BIRTH

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DATE OF DEATH

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LAST KNOWN ADDRESS (STREET, APARTMENT, ROUTE)

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CITY / TOWN

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STATE / PROVINCE

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ZIP / POSTAL CODE

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## 2. PERSONAL REPRESENTATIVE / EXECUTOR / ADMINISTRATOR INFORMATION

FULL NAME OF REPRESENTATIVE

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RELATIONSHIP TO DECEASED

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MAILING ADDRESS

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CITY / TOWN

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STATE / PROVINCE

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ZIP / POSTAL CODE

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PHONE NUMBER

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EMAIL ADDRESS

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**3. SUMMARY OF INCOME & ASSETS (PERIOD UP TO DATE OF DEATH)**

SOURCE OF INCOME / ASSET DESCRIPTION	AMOUNT / VALUE

**4. DECLARATION AND SIGNATURES**

I hereby declare under penalties of perjury that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. I certify that I am authorized to act as the personal representative on behalf of the deceased taxpayer.

SIGNATURE OF PERSONAL REPRESENTATIVE / EXECUTOR

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DATE

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SIGNATURE OF PAID PREPARER (IF APPLICABLE)

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DATE

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