

# ESTATE AND DECEASED TAXPAYER RETURN

Income Tax Return for Deceased Individual and Estate Administration

## 1. DECEASED TAXPAYER INFORMATION

FIRST NAME

LAST NAME

SOCIAL SECURITY NUMBER / TAX ID

DATE OF BIRTH

DATE OF DEATH

MARITAL STATUS AT TIME OF DEATH

LAST KNOWN ADDRESS

## 2. LEGAL REPRESENTATIVE / EXECUTOR / ADMINISTRATOR

FULL NAME OF REPRESENTATIVE

RELATIONSHIP TO DECEASED

PHONE NUMBER

EMAIL ADDRESS

MAILING ADDRESS

## 3. INCOME RECEIVED UP TO DATE OF DEATH

Income Source	Amount
Employment Income	

Income Source	Amount
Pension, Annuities, and Retirement Plans	
Interest, Dividends, and Investment Income	
Capital Gains / (Losses)	
Business or Self-Employment Income	
Other Income	
<b>Total Income</b>	

#### 4. DEDUCTIONS, CREDITS, AND LIABILITIES

Deduction / Credit Type	Amount
Medical Expenses incurred prior to death	
Charitable Donations / Bequests	
Funeral and Administration Expenses (if applicable)	
Other Allowable Deductions	
<b>Total Deductions &amp; Credits</b>	

#### 5. ESTATE / TRUST INFORMATION (IF FILING A SUBSEQUENT ESTATE RETURN)

ESTATE/TRUST NAME

ESTATE EMPLOYER IDENTIFICATION NUMBER (EIN) / TRUST TAX ID

DATE ESTATE WAS ESTABLISHED

FISCAL YEAR-END DATE

#### 6. DECLARATION AND SIGNATURE OF LEGAL REPRESENTATIVE

I hereby declare that I am the authorized legal representative/executor for the deceased individual and/or their estate. To the best of my knowledge and belief, the information provided on this return is true, correct, and complete.

\_\_\_\_\_  
SIGNATURE OF EXECUTOR / LEGAL REPRESENTATIVE

\_\_\_\_\_  
DATE (DD/MM/YYYY)