

INHERITANCE TAX RETURN ORGANIZER

Decedent Name	_____	Social Security #	_____
Address	_____	Date of Birth	_____
	_____	Date of Death	_____

Executor	_____		
Address	_____	Phone#	_____
	_____	Fax #	_____

Provide the following item to the firm for the completion of the Inheritance tax return. Following the review of your information we will advise if an Estate return needs to be completed.

	Done	N/A
1. Copy of last year tax return	_____	_____
2. Provide a copy of the will	_____	_____
3. Provide a copy of real estate tax bill which reflect the market value	_____	_____
4. Provide a copy of the mortgage and any note payables	_____	_____
5. Provide the fair market values for assets (car, furniture, etc.)	_____	_____
6. Provide bank statements for all accounts	_____	_____
7. Provide a copy of investment portfolios	_____	_____
8. Provide a list of funeral expenses and administrative costs	_____	_____
9. Provide the name, address, relationship and share of estate of each beneficiary	_____	_____
10. Provide a list of all outstanding bills for the decedent	_____	_____
11. Provide a list of all life insurance policies and pension determinations	_____	_____