

Claim for Refund on Behalf of Deceased Taxpayer

Please print or type.

For tax year decedent was due a refund: 20YY OR Other tax year ending: MMYY 66

Form fields for decedent and claimant information, including name, date of death, social security numbers, and address. Includes boxes 1 through 8 and a revenue use only section.

Part I: Check the box that applies to you. Check only one box. Be sure to complete Part III below.

- 9a Surviving spouse claiming a refund based on a joint return.
9b Court-appointed or certified personal representative. Attach a court certificate (issued after death) showing your appointment.
9c Person other than 9a or 9b claiming refund for the decedent's estate. See instructions and complete Part II below.

Part II: Complete Part II only if you checked box 9c in Part I above.

- 10a Did the decedent leave a will? YES NO
10b Has a personal representative been appointed for the estate of the decedent? YES NO
10c If you answered "No", will one be appointed? YES NO
11 As the person claiming the refund for the decedent's estate, will you pay out the refund according to the laws of the state where the decedent was a legal resident? YES NO

If you answered "No", a refund cannot be made until you submit a court certificate showing your appointment as personal representative or until you submit other evidence that you are entitled under state law to receive the refund.

Part III

I request a refund of taxes overpaid by, or on behalf of, the decedent. Under penalties of perjury, I declare that the statements made on this form have been examined by me and to the best of my knowledge, they are true, correct and complete.

Signature of Person Claiming Refund Date