Intake Form – Filing Personal Tax for a Deceased Individual

(If they were legally married, only use if spouse is not Executor/Administrator)

Deceased Name ____

Date of Birth _________________________________ Date of Death ____________________

Social Security Number __________________________________

Filing Status (S or MFS) ____________________ (MFJ only if spouse is not exec/admin)

Spouse ____

Spouse S.S. #__________________________________ Spouse DOB ___________________

Dependents Claiming on this Return:

Name ____ DOB _________________________

S.S. # ________________________ Relationship______________________ (# months) (1-12) ____

Name ____ DOB _________________________

S.S. # ________________________ Relationship______________________ (# months) (1-12) ____

Name ____ DOB _________________________

S.S. # ________________________ Relationship______________________ (# months) (1-12) ____

<u>Executor/Administrator Information:</u> (If multiple, only put who will sign return's info)

Name ____

Title (Executor or Administrator) ____

Social Security Number ____

Address ____

City ______________________________________ State ______________ Zip ____________

Home Phone _________________________________

Cell Phone _______________________________Work Phone__________________________

Date Updated 02/06/2023

Deceased Info:

Were they legally married at time of death? ___________________________

What state did they live in when they died? ______________________________

Did they have a will? _________________ Did you probate it? _________________

Did you open an estate checking account? _____________________________

Did you get a Federal ID number from the IRS for the estate? ____________________

Items Needed on Return:

1. Death Certificate
2. Will (If they had one)
3. Court Qualification Letter or Small Estate Affidavit
4. If you have a Federal ID # for the estate, we need the IRS letter granting EIN