

## **Common Items Required to Prepare Inheritance Tax Return**

1. Executors: Name, address, Social Security number, phone number, e-mail address
2. Beneficiaries: Name, address, relationship to decedent, age, Social Security number
3. Attorney: Name, address, phone number
4. Certified copy of Will and any Codicils
5. Copies of all trust agreements where the decedent was a grantor, trustee or beneficiary
6. Letter of Testamentary
7. Certified copy of death certificate
8. Last three tax returns filed for decedent -
9. Gift tax returns (if filed)
10. Real Estate: Property tax statements for year of death; copy of deeds
11. Stock and Bonds: Statements of brokerage account for month of death and/or copies of actual certificates
12. CD, Notes and Cash: Need check registers and Statement for Checking and Savings Accounts; need instrument for notes and need certificates for CDs.
13. Insurance Copy of Form 712 (Life Insurance Statement) for each policy on decedent's life
14. Individual Retirement Account (IRA) Statement for month of death.
15. Details on pension or annuity benefits that continue payment after death.
16. Value of furnishings and fixtures; value of personal effects; make, model and mileage of car
17. Expenses: Funeral expenses and administrative expenses (All disbursements since date of death)
18. Details of any assets that were sold since date of death.