



Claim for Refund on Behalf of Deceased Taxpayer

Surviving spouses and legal representatives for someone who died during the year may file a return on the deceased's behalf. Write "deceased" in large letters across the top of the return, check the box after the deceased person's name and write the date of death. Additionally, you must sign the return and write "filing as surviving spouse" or "filing as legal representative" by your signature.

Complete the form below only if the return results in a refund, and mail separately and apart from the return itself. You must also submit a copy of the death certificate to this form before mailing.

**Claim for refund cannot be processed if this information is not complete.
Death certificate must accompany this completed form.**

Deceased Taxpayer Last Name		First Name		Middle Initial
Address (permanent residence on the date of death)			SSN	
City		State	Zip	Date of Death (MM/DD/YY) ?
Last Name of Person Filing Claim (claimant)		First Name		Middle Initial
Address		City	State	Zip

I am filing this statement as (mark only one box)

- A.** ☐ Surviving wife or husband
- B.** ☐ Personal representative, executor or administrator. Attach a court certificate showing your appointment.
- C.** ☐ Claimant for the estate of the decedent where there is no court estate proceeding.

Relationship with deceased taxpayer (must be completed if Box C is checked)

Signature and Verification

I hereby make request for refund of taxes overpaid by or on behalf of the deceased taxpayer and declare under penalties of perjury in the second degree that I have examined this claim and, to the best of my knowledge and belief, it is true, correct and complete.

Signature of Claimant	Date (MM/DD/YY) ?
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