



Form E2A	ESTATE TAX INFORMATION AND APPLICATION FOR TAX CLEARANCES
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Decedent's Information

Decedent's Last Name		First Name	Initial	Decedent's Social Security Number	
Address of Residence (domicile) at Time of Death					
Spouse's/CU Partner's Social Security Number					
City	State	ZIP Code		Date of Death (mmddyyyy)	Age at Death

Administrator / Executor / Trustee Information

Administrator / Executor / Trustee Name			Telephone Number		
Mailing Address			For Department Use Only		
City	State	ZIP Code			
Foreign Country		Email Address			

Attorney Information

Attorney's Name			Telephone Number		
Mailing Address			For Department Use Only		
City	State	ZIP Code			
Foreign Country		Email Address			

1. Has the estate been entered in Probate Court? Yes, District _____ No

Section A VERMONT INCOME TAX (see instructions) Is a Vermont Income Tax Return required for Year of Death?

- Yes. A return must be filed before the tax clearance can be issued.
 No. State reason _____

Section B VERMONT FIDUCIARY TAX (see instructions) If income is received by the estate during administration, Fiduciary Tax Returns may be due. Check appropriate box. **FEIN (required):** _____

- No returns are required to be filed. Required returns have been filed. Final required returns will be filed by (mmddyyyy) _____

Section C VERMONT ESTATE TAX (see instructions)

- For deaths BEFORE 2009:** Is a U.S. Estate Tax Return, Form 706, required to be filed?
For deaths in 2009 or 2010: Is the total value of the gross estate, including taxable gifts, more than \$2,000,000.00*?
For deaths in 2011 through 2019: Is the total value of the gross estate, including taxable gifts, more than \$2,750,000.00*?
For deaths in 2020: Is the total value of the gross estate, including taxable gifts, more than \$4,250,000.00*?
For deaths in or after 2021: Is the total value of the gross estate, including taxable gifts, more than \$5,000,000.00*?
- Yes. A Vermont Estate Tax Return is required to be filed.
 No. A Vermont Estate Tax Return is not required to be filed.

***The Total Value of an estate at time of death includes jointly owned assets, solely owned assets, insurances with or without named beneficiaries and trust assets, etc. For an ancillary estate this figure includes the value of the other states assets as well as the value of the Vermont assets.**

I certify that the information contained herein is true, correct, and complete to the best of my knowledge.



Signature of Administrator/Executor/Trustee

Printed Name

Date