

TAX YEAR  
2011

**CLAIM FOR REFUND DUE  
ON BEHALF OF DECEASED TAXPAYER**

DECEDENT'S NAME	DATE OF DEATH	DECEDENT'S SOCIAL SECURITY NUMBER	
CLAIMANT'S NAME		CLAIMANT'S SOCIAL SECURITY NUMBER	
CLAIMANT'S ADDRESS	CITY	STATE	ZIP CODE

**PART 1 CHECK THE BOX THAT APPLIES TO YOU (CHECK ONLY ONE BOX). MAKE SURE TO SIGN AND DATE IN PART 3 BELOW**

- A.  Personal representative appointed or certified by court. You *MUST* attach a court certificate showing your appointment.
- B.  Person, other than A, claiming refund for the decedent's estate. Complete Part 2 and attach a copy of the death certificate or proof of death.

**PART 2 COMPLETE THIS PART ONLY IF YOU CHECKED BOX B ABOVE**

- |  | YES | NO |
|--|-----|----|
| 1. Did the decedent leave a will?.....   |     |    |
| 2a. Has a personal representative been appointed by a court for the estate of the decedent?..... |     |    |
| 2b. If "NO", will one be appointed?.....   |     |    |

*If 2a or 2b is answered "YES", the personal representative must file for the refund*

- |  |  |  |
|--|--|--|
| 3. 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?..... |  |  |
|--|--|--|

*If 3 is answered "No", a refund cannot be made until you submit a court certificate showing your appointment as personal representative or other evidence that you are entitled, under state law, to receive the refund.*

**PART 3 SIGNATURE AND VERIFICATION (ALL FILERS MUST COMPLETE THIS PART)**

*I request a refund of taxes overpaid by or on behalf of the decedent. Under penalties of perjury, I declare that I have examined this claim, and to the best of my knowledge and belief, it is true, correct, and complete.*

\_\_\_\_\_  
Claimant's Signature

\_\_\_\_\_  
Date

