

*Please print or type.*

For calendar year decedent was due a refund: 2024, OR  Fiscal year ending: MONTH YEAR MM,YY **66**

<b>1</b> Decedent's Name (last, first, middle initial)		<b>2</b> Date of Death M M D D Y Y Y Y	<b>3</b> Decedent's Social Security Number
<b>4</b> Name of Person Claiming Refund (last, first, middle initial)		Daytime Phone (with area code) <b>94</b>	<b>5</b> Claimant's Social Security Number or ITIN
<b>6</b> Home Address of Person Claiming Refund - number and street, rural route		Apt. No.	<b>REVENUE USE ONLY. DO NOT MARK IN THIS AREA.</b> <b>88</b>
<b>7</b> City, Town or Post Office		State ZIP Code	
<b>8</b> Claimant's Relationship to Decedent			

**Part 1** Check the box that applies to you. Check only one box.  
Be sure to complete Part 3 below.

<b>81</b> PM	<b>80</b> RCVD
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- 9a**  Surviving spouse claiming a refund based on a joint return.
- 9b**  Court-appointed or certified personal representative.  
Include a court certificate (issued after death) showing your appointment.
- 9c**  Person other than 9a or 9b claiming refund for the decedent's estate.  
See instructions and complete Part 2 below.

**Part 2** Complete Part 2 only if you checked box 9c in Part 1.

	YES	NO
<b>10a</b> Did the decedent leave a will? .....	<b>10a</b> <input type="checkbox"/>	<input type="checkbox"/>
<b>10b</b> Has a personal representative been appointed for the estate of the decedent? .....	<b>10b</b> <input type="checkbox"/>	<input type="checkbox"/>
<b>10c</b> If you answered "No" on line 10b, will one be appointed? .....	<b>10c</b> <input type="checkbox"/>	<input type="checkbox"/>
If you answered "Yes" to 10b or 10c, and you are <b>not</b> the personal representative (or executor of the decedent's will) do not file this form. The personal representative or executor must file for the refund.		
<b>11</b> 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?.....	<b>11</b> <input type="checkbox"/>	<input type="checkbox"/>
If you answered "No" on line 11, a refund cannot be made until you submit a court certificate showing your appointment as personal representative or until you submit other evidence that you are entitled under state law to receive the refund.		

**Part 3**

I request a refund of taxes overpaid by, or on behalf of, the decedent. Under penalties of perjury, I declare that the statements made on this form have been examined by me and to the best of my knowledge, they are true, correct and complete.

→ \_\_\_\_\_  
Signature of Person Claiming Refund

\_\_\_\_\_ Date