

# ESTATE INFORMATION SHEET



**FOR REGISTER'S OFFICE USE ONLY**

County Code    Year    File Number

      

**DECEDENT INFORMATION:** Enter data as it will appear on all documents submitted to the Department.

Decedent's Social Security Number    Date of Death    Date of Birth

      

Last Name    Suffix    First Name    MI

          

**TYPE FILING:** Fill in oval to indicate the nature of the return to be filed with the department.

Probate Return     Joint Assets Only     Non-probate Assets Only     Litigation Purposes (no other assets)

**LETTERS GRANTED:** Fill in oval to indicate the nature of the proceedings at the Register of Wills Office. (Attach additional sheets if explanation is necessary.)

Testamentary     Administration     No Letters     Other (Please Explain.)

**ATTORNEY/CORRESPONDENT INFORMATION:** Enter all information for the attorney or individual to receive tax information and correspondence.

Last Name    Suffix    First Name    MI

          

Supreme Court I.D. #    Telephone Number    Attorney/ Correspondent's e-mail address:

       \_\_\_\_\_

First Line of Address

Second Line of Address

City or Post Office    State    ZIP Code

      

**PERSONAL REPRESENTATIVE INFORMATION:** Enter all information for the personal representative(s) of the estate authorized by the Register of Wills.

**Executor/Administrator**

Telephone Number

Last Name    Suffix    First Name    MI

          

First Line of Address

Second Line of Address

City or Post Office    State    ZIP Code

      

**OFFICIAL USE ONLY**

**TRANSACTION COUNT**   

Complete general estate information questions and indicate additional personal representatives on reverse side.

**PLEASE USE ORIGINAL FORM ONLY**

REV-346 EX (03-09)

Decedent's Social Security Number

Decedent's Name: \_\_\_\_\_

**Co-Executor/Administrator**

Telephone Number

Last Name

Suffix

First Name

MI

First Line of Address

Second Line of Address

City or Post Office

State

ZIP Code

**Co-Executor/Administrator**

Telephone Number

Last Name

Suffix

First Name

MI

First Line of Address

Second Line of Address

City or Post Office

State

ZIP Code

**General Instructions:**

This form should be filed with the Register of Wills of the county of which the decedent was a resident at death.

Please be aware the correspondent identified will receive all correspondence from the department. It is the responsibility of the personal representative to notify the department if the correspondent contact information changes.

The department is authorized by law, 42 U.S.C. §405 (c)(2)(C)(i), to require disclosure of Social Security numbers in connection with administering state tax laws. The department uses the Social Security number to identify the decedent and personal representatives of the estate. The commonwealth may also use the information in exchange-of-tax-information agreements with federal and local taxing authorities. State law prohibits commonwealth personnel from disclosing confidential tax information except for official purposes.