

Estate Tax Filing Checklist

Date: _____

To: [Recipient Name]

From: [Your Name]

Subject: Estate Tax Filing Checklist

Checklist Items:

- Gather all financial documents
- Identify all assets and liabilities
- Obtain a tax ID for the estate
- Determine the value of the estate
- Collect death certificates
- Review past tax returns
- Consult with an estate attorney or tax professional
- Prepare Form 706 (if applicable)
- File the estate tax return by the deadline
- Pay any estate taxes due

Thank you for your attention to this important matter.

Sincerely,

[Your Name]

[Your Contact Information]