

Instructions for Filing Estate Taxes

Date: [Insert Date]

To: [Recipient's Name]

From: [Your Name or Executor's Name]

Subject: Instructions for Filing Estate Taxes

Dear [Recipient's Name],

This letter serves as a guide for the preparation and filing of the estate taxes for [Name of Deceased]. Please follow the instructions outlined below:

1. Gather Necessary Documentation

- Death Certificate
- Will and Testament
- Bank Statements and Financial Records
- Property Deeds
- Investment Documentation

2. Determine the Filing Requirement

Review whether the total value of the estate exceeds the federal exemption limit. As of 2023, the threshold is [Insert Amount].

3. Complete IRS Form 706

Complete IRS Form 706, United States Estate (and Generation-Skipping Transfer) Tax Return. Ensure all relevant sections are filled accurately.

4. Payment of Taxes

If taxes are owed, please arrange for timely payment to avoid penalties. Include any estimated payments made during the year.

5. Filing the Return

Submit the completed Form 706 to the appropriate IRS address by the due date, which is typically nine months from the date of death. Extensions may be available if needed.

6. Record Keeping

Keep a copy of all submitted documents and correspondence for your records. This will be useful for future reference or audits.

If you have any questions or require assistance during this process, please do not hesitate to reach out.

Sincerely,

[Your Name]

[Your Contact Information]