

# Tax Credit Transfer Form

Date: \_\_\_\_\_

To: [Recipient Name]

Address: [Recipient Address]

City, State, Zip: [City, State, Zip]

Dear [Recipient Name],

I am writing to formally request the transfer of tax credits associated with the estate of [Deceased Name], who passed away on [Date of Death]. The estate is currently being administered under case number [Case Number].

As the executor for the estate, I would like to transfer the available tax credits as follows:

- Credit Type: [Type of Tax Credit]
- Amount: [Amount]
- Transfer To: [Name of Beneficiary]

Enclosed are copies of the necessary documents, including:

- Death Certificate
- Will or Trust Document
- Proof of Tax Credit Eligibility

Please process this transfer at your earliest convenience. Should you require any additional information or documentation, feel free to contact me at [Your Phone Number] or [Your Email Address].

Thank you for your prompt attention to this matter.

Sincerely,

[Your Name]

Executor of the Estate of [Deceased Name]

[Your Address]

City, State, Zip: [City, State, Zip]

[Your Phone Number]

[Your Email Address]