

Refund Application for Deceased Taxpayer

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]

To Whom It May Concern,

I am writing to formally request a refund for the tax overpayment of the late [Deceased Taxpayer's Name], who passed away on [Date of Death]. The Social Security Number (SSN) of the deceased is [Deceased Taxpayer's SSN].

Enclosed are the necessary documents to support this application, including:

- Copy of the Death Certificate
- Form 1040 of the deceased for the tax year(s) in question
- Any supporting tax documents (W-2s, 1099s, etc.)
- A copy of my ID for verification purposes

Please process this refund to the following account or send it to my mailing address above.

Thank you for your attention to this matter. If you have any questions, please feel free to contact me at the phone number or email address listed above.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Relationship to Deceased]