

Estate Tax Refund Request

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

Estate Tax Division

[Tax Agency Name]

[Agency Address]

[City, State, Zip Code]

Subject: Estate Tax Refund Request for Deceased Individual

Dear [Tax Agency Contact/Department],

I am writing to formally request a refund of the estate taxes paid on behalf of the estate of [Deceased Individual's Name], who passed away on [Date of Death]. The estate tax return (Form [Form Number]) was filed on [Filing Date], and was paid in the amount of \$[Amount].

Upon reviewing the estate's financial records, we have determined that an overpayment occurred due to [reason for refund request, e.g., incorrect valuation, changes in tax law]. Enclosed are copies of the relevant documents that support this request, including the death certificate, the estate tax return, and any additional supporting documentation.

We kindly request that you process this refund at your earliest convenience. Should you require any additional information or documentation, please feel free to contact me using the information provided above.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]

[Your Title (if applicable)]

[Your Relationship to the Deceased (if applicable)]