

Formal Tax Refund Claim

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

[Tax Authority Name]

[Tax Authority Address]

[City, State, Zip Code]

Subject: Tax Refund Claim for [Deceased Individual's Name], SSN: [Deceased SSN]

Dear [Tax Authority Contact/Department Name],

I am writing to formally request a tax refund for the tax year [Insert Year] on behalf of my deceased [relation, e.g., father, mother, etc.], [Deceased Individual's Name], who passed away on [Date of Death].

As the executor/administrator of the estate, I am authorized to file this claim. The following documents are attached for your review:

- Copy of the death certificate
- Form 1040 for the year [Insert Year]
- Any relevant W-2s or 1099 forms
- Proof of tax payments made for the deceased

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

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Signature (if sending a hard copy)]