

Request for Estate Tax Evaluation Documentation

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request documentation regarding the estate tax evaluation for [Decedent's Name], who passed away on [Date of Death]. As the [Your Relationship to the Decedent, e.g., executor, heir], it is imperative that I access the necessary documentation to understand and comply with the estate tax obligations.

Please provide the following documents at your earliest convenience:

- Formal estate tax return (Form 706)
- Any supporting documentation related to asset valuation
- Correspondence with the IRS regarding estate tax

Thank you for your assistance.

Sincerely,

[Your Name]