ATTENTION TO ALL INDIVIDUALS WHO ARE FILING A PENNSYLVANIA INHERITANCE TAX RETURN – REV-1500


THE RETURN SHOULD BE COMPILED IN THE FOLLOWING ORDER:

- The 3 PAGE REF-1500 RETURN
- ANY APPROPRIATE SCHEDULES BASED ON THE ESTATE’S ASSETS AND DEDUCTIONS
- A COPY OF THE DECEDENT’S WILL, IF APPROPRIATE
- A COPY OF ANY INTER-VIVOS TRUST, IF APPROPRIATE
- A COPY OF ANY DEED CONCERNING REAL ESTATE LISTED ON SCHEDULES A, F OR G
- ALL LEGAL Sized DOCUMENTS SHOULD BE REDUCED TO 8½ X 11 PAPER IF POSSIBLE
- ANY ADDITIONAL DOCUMENTATION TO VERIFY THE VALUE OF ASSETS OR DEDUCTIONS

THE RETURN SHOULD BE HELD TOGETHER WITH EITHER RUBBER BANDS OR A BINDER CLIP.

DO NOT USE ANY STAPLES, METAL OR PLASTIC BINDING, 3 RING BINDER, PAPER CLIPS, AND NO METAL FOLD OVER STRAPS, ETC.


FURTHER INFORMATION CAN BE OBTAINED BY CALLING THE PENNSYLVANIA INHERITANCE TAX DIVISION AT 717-787-8327 OR FAXING YOUR QUESTION TO 717-772-0412

J PAUL DIBERT, CHIEF
INHERITANCE TAX DIVISION