

November 24, 2008

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

EFFECTIVE, DECEMBER 1, 2008, THE DEPARTMENT OF REVENUE HAS CONVERTED THE PROCESSING SYSTEM FOR THE PENNSYLVANIA INHERITANCE TAX RETURN TO A SCANNING AND IMAGE PROCESS. THEREFORE, THE INHERITANCE TAX RETURN MUST BE FILED ON A SCANNABLE RETURN EITHER PROVIDED BY THE THIS REGISTER OF WILLS OFFICE, AVAILABLE ON THE DEPARTMENT OF REVENUE'S WEB SITE OR FROM A SOFTWARE VENDOR WHO HAS HAD THEIR SOFTWARE PREAPPROVED BY THE DEPARTMENT OF REVENUE.

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.

ALL OF THE ABOVE MUST BE REMOVED BY INHERITANCE TAX DIVISION EMPLOYEES BEFORE THE DOCUMENTS CAN BE SENT FOR SCANNING. THIS WILL SLOW DOWN THE PROCESSING OF THE RETURN, THE EXAMINATION OF THE RETURN AND FINALLY THE RESPONSE TO THE ESTATE REPRESENTATIVE.

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

