

June 22, 2009

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. This form can be found at the Register of Wills Office, the Department of Revenue's web site, www.revenue.state.pa.us, or from a software vendor with software that has been pre-approved by the Department of Revenue.

The return should be compiled in the following order:

- The 3 page Rev-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.
- Any additional documentation to verify the value of assets or deductions

The return should be held together with rubber bands, a paper clip or a binder clip depending on the thickness of the estate's inheritance tax return and attachments.

Please do not use any staples, metal or plastic binding, 3 ring binder, metal fold over straps, etc.

Note that all of the above binding must be removed by inheritance tax division employees before the documents can be selected to be forwarded to the Bureau of Imaging and Document Processing for scanning. This will slow down the initial 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

