



STATE OF CALIFORNIA
FRANCHISE TAX BOARD
Telephone (916) 845-4210

REQUEST FOR ESTATE INCOME TAX CLEARANCE CERTIFICATE

As required under California Revenue
and Taxation Code Section 19513

☐ Expedite Request (see instructions)

PLEASE READ INSTRUCTIONS ON SIDE 2 BEFORE COMPLETING THIS FORM

MAIL TO: ESTATE INCOME TAX CLEARANCE CERTIFICATE UNIT MS D-7 FRANCHISE TAX BOARD PO BOX 1468 SACRAMENTO CA 95812-1468		FILE AT LEAST 30 DAYS PRIOR TO THE COURT HEARING ON FINAL ACCOUNT. APPROXIMATE DATE OF COURT HEARING _____
Estate of _____	Federal Employer Id. No. _____	Date of Death _____
Name of Fiduciary _____	Area Code and Phone No. _____	Decedent's Social Security No. _____
Address of Fiduciary (Number and Street) _____		Probate No. _____
City or Town, State, and ZIP Code _____		County of Probate _____
Name of Attorney _____		Area Code and Phone No. _____
Address of Attorney (Number and Street) _____		Mail Tax Clearance Certificate to:
City or Town, State, and ZIP Code _____		<input type="checkbox"/> Attorney <input type="checkbox"/> Fiduciary

ANSWER THESE QUESTIONS AND FURNISH THE REQUIRED DOCUMENTS

1. Was decedent a resident of the State of California on the date of death? _____.
(If "no," furnish a copy of the California Estate Tax Return (Form ET-1) and Declaration Concerning Residence (Form IT-2) if filed with the California State Controller).
2. Have probate proceedings been instituted in any other state? _____
3. Value of the assets of this estate on date of death. (Please attach federal Form 706.) _____
(If not exceeding \$1,000,000, you do not need an Estate Income Tax Clearance Certificate. **See instructions on Side 2.**)
4. Are assets exceeding \$250,000 distributable to one or more nonresident beneficiaries? _____
(If "no," you do not need an Estate Income Tax Clearance Certificate. **See instructions on Side 2.**)
5. Has a preliminary distribution been made? _____
(If "yes," furnish a copy of the court order authorizing the distribution.)

You must file a return for all taxable years that have ended (even if a return is not yet due), or submit a deposit in the form of check or bond in an amount to be determined by this office. We require a Specialized Tax Service Fee for Expedited Estate Income Tax Clearance Certificate Requests. See instructions on Side 2.

DECLARATION REGARDING CALIFORNIA RETURNS FOR DECEDENT AND FOR ESTATE (To be completed for the four taxable years immediately preceding the date of this request.)

A. DECEDENT

California Individual Income Tax Returns (Form 540, 540A, 540 2EZ, or Long or Short Form 540NR) have been filed by or on behalf of the decedent for the following years: _____. If the returns were not filed for any of the above years, explain in full: _____

B. ESTATE

California Fiduciary Income Tax Returns (Form 541) have been filed for the following years: _____. If fiduciary returns were not filed for any of the last four years during which the estate was in existence, explain in full: _____

I declare, under penalties of perjury, that the information given above is true to the best of my knowledge and belief.

SIGNATURE OF FIDUCIARY OR REPRESENTATIVE

TITLE

DATE

ALLOW AT LEAST 30 DAYS FOR A RESPONSE TO THIS APPLICATION