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| VT Form E2A | ESTATE TAX INFORMATION AND APPLICATION FOR TAX CLEARANCES |
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Decedent's Information

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|--------------------------------------------------|------------|----------|----------------------------------------------|--------------|
| Decedent's Last Name | First Name | Initial | Decedent's Social Security Number | |
| Address of Residence (domicile) at Time of Death | | | Spouse's/CU Partner's Social Security Number | |
| City | State | ZIP Code | Date of Death (mmddyyyy) / / | Age at Death |

Administrator / Executor / Trustee Information

| | | | | |
|-----------------------------------------|---------------|----------|--------------------------------|--|
| Administrator / Executor / Trustee Name | | | Telephone Number | |
| Mailing Address | | | For Department Use Only | |
| City | State | ZIP Code | | |
| Foreign Country | Email Address | | | |

Attorney Information

| | | | | |
|-----------------|---------------|----------|--------------------------------|--|
| Attorney's Name | | | Telephone Number | |
| Mailing Address | | | For Department Use Only | |
| City | State | ZIP Code | | |
| Foreign Country | Email Address | | | |

1. Has the estate been entered in Probate Court? Yes, District _____ No

Section A VERMONT INCOME TAX (see instructions) Is a Vermont Income Tax Return required for Year of Death?

- Yes. A return must be filed before the tax clearance can be issued.
 No. State reason _____

Section B VERMONT FIDUCIARY TAX (see instructions) If income is received by the estate during administration, Fiduciary Tax Returns may be due. Check appropriate box. **FEIN (required):** _____

- No returns are required to be filed. Required returns have been filed. Final required returns will be filed by (mmddyyyy) ____ / ____ / ____

Section C VERMONT ESTATE TAX (see instructions)

For deaths BEFORE 2009: Is a U.S. Estate Tax Return, Form 706, required to be filed?
For deaths in 2009 or 2010: Is the total value of the gross estate, including taxable gifts, more than \$2,000,000.00*?
For deaths in 2011 through 2019: Is the total value of the gross estate, including taxable gifts, more than \$2,750,000.00*?
For deaths in 2020: Is the total value of the gross estate, including taxable gifts, more than \$4,250,000.00*?
For deaths in 2021: Is the total value of the gross estate, including taxable gifts, more than \$5,000,000.00*?

- Yes. A Vermont Estate Tax Return is required to be filed.
 No. A Vermont Estate Tax Return is not required to be filed.

***The Total Value of an estate at time of death includes jointly owned assets, solely owned assets, insurances with or without named beneficiaries and trust assets, etc. For an ancillary estate this figure includes the value of the other states assets as well as the value of the Vermont assets.**

I certify that the information contained herein is true, correct, and complete to the best of my knowledge.



Signature of Administrator/Executor/Trustee

Printed Name

Date