

	<b>VERMONT ESTATE TAX INFORMATION AND APPLICATION FOR TAX CLEARANCES</b>	<b>FORM E2A</b>
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Name of Decedent and Address of Residence (domicile) at Time of Death	Decedent's Social Security Number	
	Spouse's/CU Partner's Social Security Number	
Name and Address of Administrator/Executor/Trustee	Date of Death	Age at Death
	Name and Address of Attorney (if any)	
Name and Address of Attorney (if any)		Has the estate been entered in Probate Court? <input type="checkbox"/> Yes. What district? _____  <input type="checkbox"/> No

**Section A VERMONT INCOME TAX** (See instructions on reverse side)

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.** Please state reason \_\_\_\_\_

**Section B VERMONT FIDUCIARY TAX** (See instructions on reverse side)

If income is received by the estate during administration, Fiduciary tax returns may be due. Please check the appropriate box below.

EIN: _____
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No returns are required to be filed.       Required returns have been filed.\*       Required final return will be filed by \_\_\_\_\_.\*  
(Date)

**\*Must enter Employer ID Number (EIN) above.**

**Section C VERMONT ESTATE TAX** (See instructions on reverse side)

Did decedent die **BEFORE** January 1, 2009?

**YES.** Complete Part 1 below.       **NO.** Complete Part 2 below.

**Part 1 COMPLETE ONLY FOR DEATHS BEFORE 2009.**

Is a U.S. Estate Tax Return, Form 706, required to be filed?

**YES.** A Vermont Estate Tax Return is required to be filed.       **NO.** A Vermont Estate Tax Return is not required to be filed.

**Part 2 COMPLETE ONLY FOR DEATHS OCCURRING IN 2009 through 2017.**

Is the total value of the estate **for deaths occurring in 2009 or 2010**, including taxable gifts, more than \$2,000,000.00\*?

**OR**

Is the total value of the estate **for deaths occurring in 2011 - 2017**, including taxable gifts, more than \$2,750,000.00\*?

**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

Date

Daytime Telephone Number