Accounting Services of York LLC
3030 E. Market St • York, PA 17402
(717) 757-5482 • TEXT (717) 759-4227
We'll count the beans... You enjoy the coffee!

Pennsylvania Inheritance Tax Intake

Returns are delivered through SmartVault unless this box is checked. ☐ **Hard copy**

Complete this intake for Pennsylvania inheritance tax preparation (REV-1500). If you need more space, attach a schedule with the same details. Upload the completed form and supporting records through SmartVault.

Decedent and Estate Information

Decedent's full legal name _____ Social Security number _____

Date of death _____ County of residence at death _____

Last mailing address _____

City _____ State _____ ZIP _____

Register of Wills county _____ Estate file number, if assigned _____

Was there a surviving spouse? ☐ Yes ☐ No ☐ Unsure

Surviving spouse's name, if applicable _____

Was there a will? ☐ Yes ☐ No ☐ Unsure

Executor or Estate Representative

Full legal name _____ Role _____

Mailing address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

Date appointed, if applicable _____ Attorney name and contact, if applicable _____

Pennsylvania Inheritance Tax Payments

Has any Pennsylvania inheritance tax been paid? ☐ Yes ☐ No ☐ Unsure

Payment date _____ Amount _____ County or payment reference _____

Attach payment receipts, any prior inheritance tax return, notices, and extension correspondence if available.

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Assets and Transfers

Decedent's name _____

List assets and ownership as of the date of death. For each asset, give a description, the date-of-death value and its source, ownership share, and the recipient if it passed directly to someone. Attach a detailed inventory or schedule if available.

Assets to Report

Real estate. Provide property address, deed, ownership share, and appraisal or other valuation.
Bank and investment accounts. Provide date-of-death statements and accrued interest, if shown.
Business, partnership, or farm interests. Attach ownership and valuation records and flag any exemption you may be claiming.
Mortgages, loans, or notes owed to the decedent. Provide balances and copies of agreements.
Vehicles, household items, valuables, and other property. Provide value and supporting records.
Life insurance, retirement accounts, annuities, and other benefits. Provide contract or plan details, values, and beneficiary designations for review.

Jointly Owned Property and Other Transfers

Did the decedent own any property jointly with another person? ☐ Yes ☐ No ☐ Unsure

For jointly owned property, provide each owner's name and relationship to the decedent, when joint ownership began, ownership shares, and how the property was titled.

Did anything pass directly through a beneficiary designation or trust? ☐ Yes ☐ No ☐ Unsure

Did the decedent make gifts or transfers within one year before death? ☐ Yes ☐ No ☐ Unsure

Did the decedent transfer property and retain use, income, or control? ☐ Yes ☐ No ☐ Unsure

For transfers, provide the date, recipient and relationship, property description, value, any payment received, and related documents. Flag any life estate, trust interest, or right to future payments.

Asset and Transfer Notes

_____

_____

_____

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Beneficiaries Debts and Expenses

Decedent's name _____

List each person, trust, charity, or other organization receiving property. Include recipients under the will, by joint ownership, or through a beneficiary designation. Attach additional entries if needed.

Beneficiary Details

1. Full legal name _____ Relationship to decedent _____

Mailing address _____

Share (%) or specific bequest _____ Value, if known _____

2. Full legal name _____ Relationship to decedent _____

Mailing address _____

Share (%) or specific bequest _____ Value, if known _____

3. Full legal name _____ Relationship to decedent _____

Mailing address _____

Share (%) or specific bequest _____ Value, if known _____

Debts and Expenses

Provide itemized records for debts owed at death, including mortgages, liens, and unpaid bills. Include funeral and burial costs, executor fees, attorney and accounting fees, and other administration expenses. Include invoices and any reimbursements.

Other debts or expenses _____

Documents to Upload Through SmartVault

Death certificate, signed will and codicils, trust documents if relevant, and court appointment papers.
Asset inventory, deeds, date-of-death statements or appraisals, and beneficiary designations.
Records of joint ownership and transfers, invoices, debt balances, payment receipts, and tax notices.

Completed by _____ Date _____

ACCOUNTING SERVICES OF YORK, LLC

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Pennsylvania Inheritance Tax Engagement

Form REV-1500 | Tax preparation agreement

Decedent's legal name

Date of death | **County of filing** | **Estate file number, if assigned**

Estate representative's name and capacity

Additional services expressly included, if any

1. Client and scope of services

Accounting Services of York, LLC (ASY) will prepare the Pennsylvania Inheritance Tax Return for a resident decedent, Form REV-1500, and applicable schedules. We will use the records you provide to report assets, transfers, beneficiaries, and deductions, and deliver the completed return with filing and payment instructions. You confirm your authority to engage ASY and provide estate records. Tell us if your authority changes or someone else is reporting or paying inheritance tax on the same property.

Final Form 1040, fiduciary income tax returns, federal estate tax returns, nonresident Pennsylvania inheritance tax returns, and supplemental or amended returns require separate written acceptance. Probate administration, legal advice, appraisals, notice responses, appeals, and tax agency representation require separate arrangements.

2. Your responsibilities

Provide a completed intake and complete, accurate, organized records, including applicable death certificate, will, appointment papers, trust documents, statements, deeds, appraisals, beneficiary designations, and proof of prior inheritance tax payments. Disclose potentially reportable assets and transfers, including jointly held property, named-beneficiary accounts, annuities, trust assets, and transfers before death.

Provide each beneficiary's relationship to the decedent and share or property received, together with any disclaimers or other changes affecting who receives property. Document debts, funeral expenses, and administration expenses. Obtain and support date-of-death values and promptly provide corrections or newly discovered information.

ASY may request supporting documents. We do not independently appraise assets, audit records, or determine legal ownership or entitlement. ASY may pause or decline work if material information is missing or a reporting position cannot be supported.

3. Deadlines, prepayments, and extensions

The return and payment are generally due nine months after death. Pennsylvania generally allows a 5% discount on qualifying tax paid within three months after death. You may prepay before filing. If you want help estimating a prepayment, contact us early and provide the necessary records. You are responsible for timely payment and providing proof of payment.

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Pennsylvania Inheritance Tax Engagement

Form REV-1500 | Tax preparation agreement

3. Deadlines, prepayments, and extensions (continued)

ASY begins preparation after receiving the signed agreement, completed intake, and all required records. If the complete package arrives within 21 calendar days before the original filing deadline, timely completion is not guaranteed. For accepted engagements, ASY will request an available extension when needed if we receive the required information and authorization in time. We confirm submission upon request. A filing extension does not extend the payment deadline or discount period.

4. Fees and payment

Fees depend on complexity, required schedules, and the condition of the records. Receipt totaling, reconciliation, and other cleanup are billed separately at **$150 per hour**. New clients pay a **$100 retainer for this engagement**, applied to the related invoice and nonrefundable except where required by law. Payment is due at completion and before filing by ASY, if included. Unpaid fees for completed returns will be sent to collections 30 days after ASY notifies you that the return is ready.

5. Review, filing, and delivery

Review the finished return and schedules and report corrections before filing. Unless ASY agrees in writing to submit the return, you must sign it, file it with the appropriate county Register of Wills, pay the tax, and retain proof of filing and payment. If ASY agrees to submit it, provide the signed return or authorizations and pay the invoice in time for submission. You remain responsible for making tax payments and confirming they are received and credited.

ASY delivers the completed return through SmartVault unless you request a hard copy on the intake. Submit confidential records through SmartVault or deliver them to the office. If you want help with a notice or assessment, send a complete copy promptly. You remain responsible for response deadlines while arrangements are made.

6. Completion and termination

If you file the return, the engagement ends when ASY delivers the completed return and instructions. If ASY files it, the engagement ends when we submit it and communicate any remaining steps. Either party may terminate in writing. ASY will communicate unfinished work and known deadlines. Fees for work already performed remain due.

Acceptance

I confirm my authority to act in the capacity identified above. I have read this agreement, understand my responsibilities, and authorize the work described. Changes in scope require ASY’s written acceptance.

Estate representative’s printed name and capacity

Estate representative signature

Date

ASY representative signature

Date