

Kentucky Inheritance Tax Return

(Short Form)

FOR DEPARTMENT USE ONLY			
_____ / 4 / 6 / _____ Account Number Tax Mo Year			

This form is designed for small, uncomplicated estates. *Requirements for use of this return*—This return may be used when (1) a federal estate tax return is **not** required to be filed, (2) the assets of the estate consist of 10 items or less, (3) no gifts or transfers were made within three years of death without full consideration, (4) no real or personal property was transferred with a retained life interest, (5) the decedent did not possess any power to appoint any real or personal property or have the use of any qualified terminable interest property, and (6) the decedent had not received any real or personal property from another decedent within five years and paid inheritance tax on the property. **Pursuant to KRS 140.190**, the beneficiaries as well as the personal representative(s) may be held personally liable for the tax.

Return Status (check one): <input type="checkbox"/> Original Return <input type="checkbox"/> Amended Return—Refund <input type="checkbox"/> Amended Return—Tax Due
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Decedent's Name Last		First		Middle Initial		Date of Death	
Social Security Number		Occupation <i>(If decedent was retired at death, state occupation prior to retirement.)</i>		Age at Death		Cause of Death	
Residence (Domicile) at Time of Death							
Number and Street		City		State		ZIP Code	
Name and Address of Executor/Administrator/Beneficiary				Name and Address of Preparer			
<input type="checkbox"/> Exec		<input type="checkbox"/> Admr		<input type="checkbox"/> Atty		<input type="checkbox"/> CPA	
<input type="checkbox"/> _____		<input type="checkbox"/> _____		<input type="checkbox"/> _____		<input type="checkbox"/> _____	

Did the decedent have a will? No Yes ***If Yes, attach a copy of the will.***

Did the decedent have a trust agreement? No Yes ***If Yes, attach a copy of the trust agreement.***

Net Estate (from page 2)	\$
Inheritance tax due from Section III on reverse side	\$
Discount of 5% from tax if paid within 9 months from death.....	-
Total Tax Due	\$
Interest and Penalty	
Interest for late payment (see general information)	\$
Late filing penalty (see general information).....	\$
Late payment penalty (see general information)	\$
Total due (tax plus interest and penalties, if applicable)	\$
Total previously paid	\$
Balance due/Refund	\$



**Attach check payable to "Kentucky State Treasurer" to this return and mail to
Kentucky Department of Revenue, Frankfort, KY 40620**

Under criminal penalties, I declare that this return, including accompanying documents, has been examined by me, and is, to the best of my knowledge and belief, true, correct and complete.

			☎ ()
Signature of Executor/Administrator/Beneficiary	Social Security Number	Date	Telephone Number

E-mail Address of Executor/Administrator/Beneficiary			
		☎ ()	
Signature of Preparer	Date	Telephone Number	E-mail Address

