

## Deceased Taxpayer Form

---

EFIN:	Date:
Primary Taxpayer Social Security #:	
Spouse's Social Security #:	
Names on check:	
Name of the deceased:	
Date of death:	
Taxpayer/Authorized Payee Signature:	
Taxpayer/Authorized Payee Name:	
ERO Name:	
ERO Signature:	

The following documents are required in order to process this request; **Death certificate, Letter of Administration, Original Voided Check and Photo ID of the Taxpayer/Authorized Payee.**

**EPS will not process a bank product for a deceased taxpayer.**

If a person became deceased **AFTER** a bank product was applied for, and the return was filed as "Married Filing Jointly," we will remove the deceased person's name from the check.

If the filing status was anything **OTHER** than "Married Filing Jointly," we will add "**DECEASED**" after the decedents name to assist with check cashing.

**NOTE:** *If a bank product was applied for using a deceased person's name and social security number, the funds will be returned to the IRS/State.*



**ATTENTION: Have you attached the following REQUIRED DOCUMENTS?**

PHOTO ID    LETTER OF ADMINISTRATION    VOIDED CHECK    DEATH CERTIFICATE

Fax To: **484-546-2997** or Email To: [Forms@EPSFinancial.net](mailto:Forms@EPSFinancial.net)