WFG National Title Insurance Company
a Williston Financial Group company

PENNSYLVANIA

DOCUMENT CHECKLIST FOR CLEARING INHERITANCE TAX LIENS

___ Estate opened

County: _______________

Date: _________________

File #: _________________

___ Time-stamped Inheritance Tax Return (Form REV-1500) with Schedules attached

Date filed: _____________

___ Insured Property(ies) reported on Inheritance Tax Return (usually Schedule A, F, or G)

___ Notice of Inheritance Tax Appraisement and Assessment of Tax

Date: _____________

____ Values and Estate information match time-stamped Inheritance Tax Return

____ Total Due is $0 or negative (indicating a refund is owed) – (usually on page 2)

____ *If Total Due is > $0, then also:*

Either ___ *Receipts from ROW or DOR showing payment in full*

Receipt No. _______; Date ___________, Amt: $_________________

Receipt No. _______; Date ___________, Amt: $_________________

Receipt No. _______; Date ___________, Amt: $_________________

[Add additional as needed]

Or ___ *Statement of Account dated after Notice of Appraisement showing all payments and $0 remaining balance.*

*Note: For older Estates where documentation is no longer available and cannot be obtained from the Register of Wills, correspondence from the Department of Revenue indicating that all inheritance taxes were paid or there were no inheritance taxes due for the Estate is acceptable. The Department must be informed of the Estate(s) and the Property(ies) at issue, to confirm the Property(ies) was reported and therefore released from the lien. Like all documents, this correspondence must be saved to your file.