

Estate and Gift Tax Power of Attorney Form

Use this form to authorize an individual to represent you before tax authorities regarding estate and gift tax matters. This form is designed for printing and physical signature.

1. Taxpayer Information (Grantor)

Full Name of Taxpayer (or Decedent if Estate):

Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN):

Executor, Administrator, or Personal Representative (if Taxpayer is deceased):

Mailing Address:

City, State, and ZIP Code:

Telephone Number:

2. Appointed Representative (Attorney-in-Fact)

Full Name of Representative:

Firm Name (if applicable):

Mailing Address:

City, State, and ZIP Code:

Telephone Number:

Email Address:

3. Tax Matters Authorized

Specify the tax matters for which representation is authorized. (e.g., Estate Tax, Gift Tax, Generation-Skipping Transfer Tax)

Type of Tax (e.g., Federal Estate Tax, Federal Gift Tax, State Inheritance Tax):

Tax Form Number (e.g., Form 706, Form 709):

Year(s) or Period(s) (e.g., Year of Death, Calendar Year):

4. Acts Authorized

The representative is authorized to receive and inspect confidential tax information and to perform any and all acts that the taxpayer can perform with respect to the tax matters described above. State any specific limitations or additions below:

Specific Limitations / Additional Powers:

5. Signatures and Execution

By signing below, the taxpayer authorizes the representative named in Section 2 to act on their behalf.

Taxpayer (or Authorized Representative) Signature

Printed Name of Signatory:

Title (if signing on behalf of an estate or entity):

Signature (To be signed in ink after printing):

Date Signed:

Representative Declaration and Signature

Representative Designation (e.g., Attorney, CPA, Enrolled Agent, Family Member):

Jurisdiction (State / Licensing Authority):

License or Enrollment Number:

Representative Signature (To be signed in ink after printing):

Date Signed: