

Inheritance data collection

Deceased, heirs, assets, gifts, debts:
everything needed, in order.

What it is for. preparing the inheritance tax return without forgetting anything. Write what you know: we look for the rest.

How to fill it in. iPhone and iPad: save the PDF to Files, open it with Preview or Files, tap the boxes to type; to sign: Markup > Add signature; then Share. **Android:** open it with Google Drive > Edit > Form filling, or with Adobe Acrobat Reader > Fill & Sign.

Computer: Acrobat Reader, Chrome or Edge. Send it back to segreteria@notaiofiorentinomarco.com, to our PEC or through the Client area.

Before you start

The inheritance tax return must normally be filed **within 12 months** of the date of death. With these details we prepare the return, the cadastral updates and the tax calculation. The same details can be entered online: [Inheritance online](#) (in Italian).

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1. THE DECEASED

Surname

First names (all, as on the ID)

Place of birth (town or country)

Province

Date (dd/mm/yyyy)

Italian tax code (codice fiscale)

Citizenship

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Address: street and number

Postcode

Town

Prov./State

Date of death

Place of death

Marital status

☐

Left **no** will

☐

Left a will (handwritten, public or secret):
please send us a copy

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2. HEIRS AND LEGATEES

One line per person: spouse, children (also predeceased, with their children), parents, siblings, as the case may be.

Name and surname

Tax code

Relationship

Phone / email

Name and surname

Tax code

Relationship

Phone / email

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Name and surname

Tax code

Relationship

Phone / email

Name and surname

Tax code

Relationship

Phone / email

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Name and surname

Tax code

Relationship

Phone / email

3. PROPERTIES

For each: town, address, sheet, parcel, sub-unit, share of the deceased.

Town and address

Sheet / parcel / sub

Share

First home of an heir?

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Town and address

Sheet / parcel / sub

Share

First home of an heir?

Town and address

Sheet / parcel / sub

Share

First home of an heir?

Town and address

Sheet / parcel / sub

Share

First home of an heir?

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4. ACCOUNTS, SECURITIES, SHARES, VEHICLES

Bank, post office or company

Type (account, securities, policy, shares, car)

Balance or value at the date of death (EUR)

Bank, post office or company

Type (account, securities, policy, shares, car)

Balance or value at the date of death (EUR)

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Bank, post office or company

Type (account, securities, policy, shares, car)

Balance or value at the date of death (EUR)

Bank, post office or company

Type (account, securities, policy, shares, car)

Balance or value at the date of death (EUR)

5. GIFTS MADE DURING LIFETIME

To whom, what, when, with which notary

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6. DEBTS AND DEDUCTIBLE EXPENSES

Mortgages, debts, medical and funeral expenses, with amounts

7. WHO FOLLOWS THE FILE

Name and surname of the contact person

Phone

Email

I declare the details are true to the best of my knowledge. The Notary will check them on the documents.

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Place

Date

Signature (by hand, or Markup > Add signature, or digital signature)

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