

[Date]

[Executor Name]

[Executor Address]

[City, State, Zip Code]

Re: Estate of [Deceased Name] - Status of Estate Tax Return (Form 706)

Dear [Executor Name],

I am writing to provide you with a formal update regarding the preparation and filing status of the federal and state estate tax returns for the Estate of [Deceased Name].

Current Progress:

Our firm has completed the initial review of the asset valuations and financial records provided. We are currently in the process of [mention specific stage, e.g., finalizing the calculation of tax liability / drafting the final schedules / waiting for final appraisals].

Pending Information:

To finalize the return, we still require the following documentation:

- [Item 1]
- [Item 2]

Filing Deadlines:

The statutory deadline for filing the return and paying any tax due is [Date]. [Optional: Please note that we have filed an extension, which moves the filing deadline to (Date)].

Next Steps:

Once the missing information is received, we will provide you with a draft of the return for your review and signature. Please be aware that the final tax payment must be coordinated by [Date] to avoid interest or penalties.

If you have any questions regarding the progress or the requirements listed above, please contact our office at [Phone Number].

Sincerely,

[Your Name/Firm Name]

[Title]