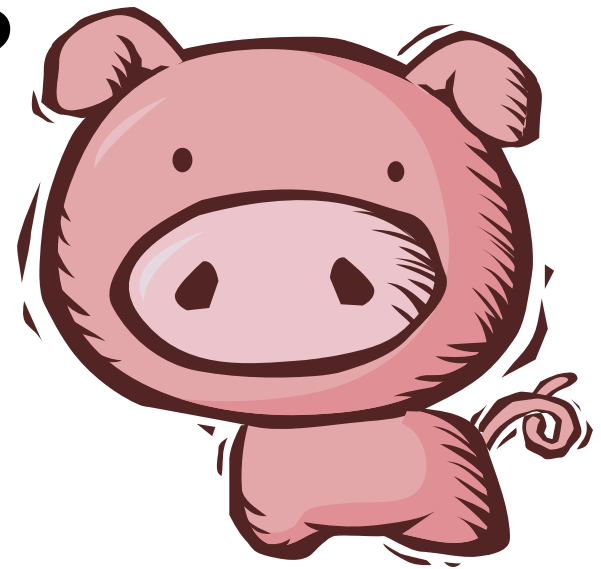


What is happening in the PA Inheritance Tax Division?

Do we have “Swine
Flu” or are we just
Sloooooow?



- Current time frame for examining an inheritance tax return is 5 to 5½ months from the date the return is filed at the Register of Wills.

- Return is prepped for scanning
- Imaged
- Key Punched
- Added to queue in 1st in, 1st out basis.

- Return reviewed and notice of Assessment sent to Estate Representative and Register of Wills

- New Processing techniques:
 - E-mail Response
 - Fax
 - Telephone Requests for additional information

- ACD
Telephone
line for
quicker
response
to
telephone
caller



- ACD telephone individuals can view image of data while taxpayer or estate representative is on telephone

- New Enforcement techniques:
 - CITES
 - Citations
 - Liens

- Pre-approval of WD/SA Petitions
- OCC Compromises on “Old Estates” with many deceased owners

- Planned Improvements
 - Electronic Transfer of data between Register of Wills and Department of Revenue

- **Come to the individual session to get up to date information on where the PA Dept of Revenue is heading.**
- **How to file an inheritance tax that will pass through the system without any problems.**
- **How to resolve a problem before it gets TOO BIG TO CONTROL!!!**