

DECEASED TAXPAYER FORM

REMINDER: By submitting this form, you are asking EPS Financial to make updates to a deceased taxpayer's check. Please note, if the taxpayer was deceased BEFORE applying for a bank product, ALL funds will be returned.

EFIN:

ERO NAME:

TAXPAYER'S NAME:

LAST 4 OF SSN:

SPOUSE'S NAME

LAST 4 OF SSN:

DECEASED:

- Taxpayer Spouse

Please check the correct filing status below:

TP became deceased AFTER the bank product was submitted AND the filing status is "Married filing Jointly" (The taxpayer's name can be removed from check)

Taxpayer became deceased AFTER the bank product was submitted AND the filing status is anything other than "Married filing Jointly" ("Deceased" will be added after the taxpayer's name on check)

Taxpayer or Executor of the Estate Signature:

DATE:

Spouse or Executor of the Estate Signature:

DATE:

ATTENTION: DID YOU ATTACH THE FOLLOWING, REQUIRED DOCUMENTS?

- DEATH CERTIFICATE
- EXECUTOR OF THE ESTATE DOCUMENTATION
- VOIDED "LIVE" CHECK

UPLOAD THIS FORM AND ALL REQUIRED DOCUMENTS TO YOUR DIRECT ACCOUNT
AT EPSTAX.NET OR EMAIL TO TAXFORMS@METABANK.COM

ERO SIGNATURE:

DATE:

IF YOU HAVE ANY QUESTIONS, PLEASE CALL CUSTOMER SUPPORT AT (888)782-0850