



Draft inheritance tax return

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

Document issued on 24/09/2026

39 days to spare · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Draft intended for the notary's review**; it goes to no authority. **The notary reviews and signs.**

Where the file stands

Item	State	Document that establishes it
Devolution of the estate	Settled by the notary	Verified civil-status records
Assets listed	Line by line	Statements, title, cadastral extract
Liabilities	Evidenced entry by entry	Invoices and notices received
Allowances per heir	Filled in by relationship	Birth records
14 documents expected	14 obtained	Last received the day before yesterday

The three points put to the notary, and what is already prepared

Point	What is established	What belongs to the notary
Life-insurance policy taken out after the deceased turned 70	Exact payment dates isolated in the insurer's statement	The regime retained and the advice to the heirs
Property held in undivided ownership since a 2011 gift	Gift found in the office's file, share calculated	Confirming the share
Antique item to be valued	The three accepted methods, quantified on this item	The choice of method, which commits the office

The filing deadline is six months where the death occurred in France, twelve months where it occurred abroad. Here, filing is possible with **39 days to spare**.

Valuation method retained: _____ · Reviewed and signed by: _____

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