Draft inheritance tax return

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

Document issued on 09/11/2026

39 days to spare · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

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: _____

Request a demo with your own documents

This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.

https://bluelemonagent.ai/en/entreprises/cas-usage/agent-ia-etude-notariale

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.

LINDBERGH FORMATION — Blue Lemon Agent — Companies register (RCS) Évry 817 946 114 —
Legal notice (in French): bluelemonagent.ai/mentions-legales