



Application for Release of Safe Deposit Box

For estates of decedents dying before February 1, 2000

Decedent information

| | | | | |
|---|-------|----------------|------------------------|--|
| Decedent's last name | First | Middle Initial | Social security number | |
| Address of decedent at time of death (<i>number and street</i>) | | | Date of death | Attach a copy of the death certificate |
| City, village or post office | State | ZIP code | County of residence | |

On the date of death, decedent was a: Resident of New York State Nonresident of New York State

Applicant information

| | |
|--|--------------------------|
| Name of applicant (<i>last, first, middle initial</i>) | Relationship to decedent |
| Address of applicant | |
| City, village or post office | State ZIP code |
| Social security number of applicant | Telephone number () |

Bank information

| | |
|--|---|
| Name and address of bank where safe deposit box is located | Safe deposit box number(s) |
| | If the box was held jointly in the name of the decedent and another, or a deputy was named, check the appropriate box and enter the name of the other joint tenant or the deputy. |
| | <input type="checkbox"/> Joint tenant <input type="checkbox"/> Deputy |
| | Name |

Sign below

| | |
|------------------------|------|
| Signature of applicant | Date |
|------------------------|------|

Instructions

Note: Estates of individuals dying on or after February 1, 2000, are not required to obtain a release of the safe deposit box from the Tax Department.

This form may be filed by an executor, administrator, joint tenant, deputy, the attorney for the estate, the decedent's next of kin, or any person having an interest in the estate who has knowledge of the decedent's assets.

Since other laws may apply to the release of safe deposit boxes, check with your bank or safe deposit company for any additional requirements.

The term executor includes executor, executrix, administrator, administratrix, or personal representative of the decedent's estate. If no executor, executrix, administrator, administratrix, or personal representative is appointed, qualified, and acting within the United States, any person acting in the capacity of executor (by virtue of the fact that that person is in actual or constructive possession of any property of the decedent) may apply for the release of the safe deposit box.

Mail the completed application form to:

**NYS TAX DEPARTMENT
TTTB - ESTATE TAX AUDIT - 855
W A HARRIMAN CAMPUS
ALBANY NY 12227**

Privacy notification

The right of the Commissioner of Taxation and Finance and the Department of Taxation and Finance to collect and maintain personal information, including mandatory disclosure of social security numbers in the manner required by tax regulations, instructions, and forms, is found in Articles 22, 26, 26-A, 26-B, 30, 30-A, and 30-B of the Tax Law; Article 2-E of the General City Law; and 42 USC 405(c)(2)(C)(i).

The Tax Department will use this information primarily to determine and administer tax liabilities due the state and city of New York and the city of Yonkers. We will also use this information for certain tax offset and exchange of tax information programs authorized by law, and for any other purpose authorized by law.

Information concerning quarterly wages paid to employees and identified by unique random identifying code numbers to preserve the privacy of the employees' names and social security numbers will be provided to certain state agencies for research purposes to evaluate the effectiveness of certain employment and training programs.

Failure to provide the required information may result in civil or criminal penalties, or both, under the Tax Law.

This information will be maintained by the Director of the Registration and Data Services Bureau, NYS Tax Department, Building 8 Room 924, W A Harriman Campus, Albany NY 12227; telephone 1 800 225-5829. From areas outside the U.S. and outside Canada, call (518) 485-6800.



Change in Mailing Address and Assistance Information for Certain Estate Tax Forms

On July 1, 2008, we changed processing centers. Any estate tax form that instructs you to mail the form to: NYS Estate Tax, Processing Center, PO Box 5556, New York NY 10087-5556, must be mailed to this address instead (see *Private delivery services* below):

**NYS ESTATE TAX
PROCESSING CENTER
PO BOX 15167
ALBANY NY 12212-5167**

Any estate tax form that instructs you to mail the form to: TTTB-Estate Tax Audit-855, TTTB-Estate Tax-855, Transaction and Transfer Tax Bureau-Estate Tax, TTTB-Estate Tax Audit, or TTTB-Estate Tax, must be mailed to one of these addresses instead:

If you are sending by U.S. Mail:

**NYS TAX DEPARTMENT
TDAB/ESTATE TAX
W A HARRIMAN CAMPUS
ALBANY NY 12227-2994**

If you are sending by a private delivery service:

**NYS TAX DEPARTMENT
TDAB/ESTATE TAX
90 COHOES AVENUE
GREEN ISLAND NY 12183-1515**

Note: Forms mailed to the old address may be delayed in processing.

Private delivery services

If you choose, you may use a private delivery service, instead of the U.S. Postal Service, to mail in your form and tax payment. However, if, at a later date, you need to establish the date you filed or paid your tax, you cannot use the date recorded by a private delivery service **unless** you used a delivery service that has been designated by the U.S. Secretary of the Treasury or the Commissioner of Taxation and Finance. (Currently designated delivery services are listed in Publication 55, *Designated Private Delivery Services*. See *Need help?* below for information on obtaining forms and publications.) If you have used a designated private delivery service and need to establish the date you filed your form, contact that private delivery service for instructions on how to obtain written proof of the date your form was given to the delivery service for delivery.

Need help?



Visit our Web site at www.tax.ny.gov

- get information and manage your taxes online
- check for new online services and features



Telephone assistance

Estate Tax Information Center: (518) 457-5387

To order forms and publications: (518) 457-5431



Text Telephone (TTY) Hotline (for persons with hearing and speech disabilities using a TTY):

If you have access to a TTY, contact us at (518) 485-5082. If you do not own a TTY, check with independent living centers or community action programs to find out where machines are available for public use.



Persons with disabilities: In compliance with the Americans with Disabilities Act, we will ensure that our lobbies, offices, meeting rooms, and other facilities are accessible to persons with disabilities. If you have questions about special accommodations for persons with disabilities, call the information center.