

California State Deceased Spouse's Name on Refund

My spouse passed away. You sent a refund with both our names on it. What do I do?

Take the check and a copy of the death certificate to your bank and try to cash or deposit it.

If your bank will not accept the refund check, call 800 852-5711 and select option 5 to speak with a Franchise Tax Board Representative. The Franchise Tax Board will send you a letter which authorizes the bank to accept the check. Take the letter, the check and a copy of the death certificate to the bank. If your bank still will not accept the check, you will need to return it to the Franchise Tax Board. Send a letter, along with the uncashed check and a copy of the death certificate, asking for the check to be issued in your name only.

Mail your request to:

Franchise Tax Board
P.O. Box 942840
Sacramento, CA 94240-0040

Please allow 4 weeks from the date of your letter to receive the new refund check..



LEGAL AID SOCIETY OF ORANGE COUNTY/COMMUNITY LEGAL SERVICES

Low Income Taxpayer Clinic

(800) 834-5001 or (714) 571-5200

Mondays – Thursday 9 a.m. – 8 p.m./Fridays 9 a.m. – 4 p.m.