The withholding tax shown on your New York State fiduciary tax return does not match the withholding tax reported by the persons or entities that paid income to your estate or trust.

To prove the amount of taxes withheld that you have claimed on your return, send us all of the following that show taxes withheld for New York State, New York City, or Yonkers:

- Forms 1099
- Forms W-2
- Any other withholding tax statements

It is important that you respond. If we do not hear from you, you will not receive the refund you requested.

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What to do next

– Keep copies of all the items you send. Do not send us your original documents. We are unable to return them.

– Be sure to complete and include the enclosed Form DTF-973.61, Response to Inquiry, with the material you send us. The form is important because it tells us who you are.

You can send us the information in any of the following ways:

Online: Responding online using your Online Services account is the easiest and fastest way to respond. Once you have logged into your account, follow the next steps from the Account Summary page:

– Open the Services menu by selecting the menu icon in the upper left corner.
– Select Respond to department notice.
– Select Respond to department notice from the expanded menu.
– From the Questionnaire page, select I received a notice about my refund.
– Select notice DTF-973.96-O.
– Enter the DLN: PX9999999999.

If you do not have an Online Services account, visit our website to create one.

Fax: 999-999-9999

Mail: NYS TAX DEPARTMENT
XXXXXXXXXXXXXXXXXXX
W A HARRIMAN CAMPUS
ALBANY NY 12227-9995

If not using U.S. Mail, see Publication 55, Designated Private Delivery Services.

We process replies in the order that we receive them. The sooner you respond, the sooner we can complete our review. When we complete our review, we will send you a notice regarding our findings.

Questions?

– Visit our website
– Call us at 999-999-9999

Your rights as a taxpayer:

– For a full explanation of your rights as a taxpayer, go to www.tax.ny.gov/tra/rights.htm.
– No Internet access? Call us at 518-457-3280 and we will mail you a statement of your rights.