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Commonwealth of Pennsylvania
Harrisburg

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MEMORANDUM

TO: All House Members

FROM: Rep. Doug Reichley

SUBJECT: Co-Sponsor Memo: Surviving Spouse Tax Filings (Prior HB 847)

DATE: February 1, 2011

The General Assembly is constantly reviewing legislation designed to improve our tax filing requirements in order to make them more conducive for taxpayers across Pennsylvania. However, as the new legislative session begins, there are certainly several areas of concern that should be addressed as it relates to easing the requirements taxpayers are obligated to meet each year.

One area of concern which has been discussed in previous sessions relates to the filing requirements for a surviving spouse when a loved one passes. Current Pennsylvania filing requirements prohibit a individual from filing a joint tax return with a deceased spouse for the tax year in which the spouse passed. This means that a surviving spouse is required to file two separate state tax returns, thus adding additional effort and cost as it relates to tax preparation.

With this in mind, I will be re-introducing legislation which will amend the Tax Reform Code with the intent of addressing this filing requirement. If enacted, my legislation will permit an individual to file either a separate or joint return for the tax year in which the deceased spouse passed.

Please join me in my efforts to assist grieving spouses across Pennsylvania by reducing the tax burden they are required to shoulder. If you wish to co-sponsor this important piece of legislation, please contact my Harrisburg assistant Kendra Wiederhold at 787-1000 or kwiederh@pahousegop.com.