

Taxes & More

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ESTATE AND TRUST QUESTIONNAIRE

Also Known As (Aliases) Trust Name Date of Death Birth Date Federal EIN POA Social Security Number US Cit Spouse's Full Legal Name Also Known As (Aliases) Marriage Date Birth Social Security Number US Cit Home Address County of Residence Year Residence Established in this State Divorced Widowed Single Provide inform Please indicate below which of the children resulted from the prior r of your relationship with the ex-spouse. (Good, bad, other-explain) Information on Person Filling in Questionnaire: Name Address Phone	Form 56			·	
Date of Death	Form 56			rust Name	
Social Security Number	Form 56	Birth Date			
Social Security Number				ate of Death	
Spouse's Full Legal Name	tizen?	POA	ederal EIN		
Also Known As (Aliases) Birth Social Security Number US Cit Home Address County of Residence Year Residence Established in this State Divorced Widowed Single Provide inform Please indicate below which of the children resulted from the prior rof your relationship with the ex-spouse. (Good, bad, other-explain) Information on Person Filling in Questionnaire:		US Citizen?		ocial Security Number	
Marriage Date			ne	pouse's Full Legal Na	
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Home Address County of Residence Year Residence Established in this State Divorced Widowed Single Provide inform Please indicate below which of the children resulted from the prior r of your relationship with the ex-spouse. (Good, bad, other-explain) Information on Person Filling in Questionnaire:	Birth Date			Marriage Date	
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Name Address Phone	E-mail		_		
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Personal Representative(s)

Name	Address	Phone/e-mail	Date of Birth	Social Security #

Heirs - Beneficiaries (including deceased children and children of deceased children, or if no children, then parents, if no parents, then siblings and nieces and nephews of predeceased siblings)

Use full legal names

Referred By:

Name	Address/Phone/Email	Date of Birth	Relationship	Social Security #

CHECKLIST FOR TRUST-ESTATE

PLEASE FORWARD THE FOLLOWING DOCUMENTS TO BEGIN THE ENGAGEMENT _____ Engagement Letter ____ Deposit (minimum of \$500) Trust ____ Will Death Certificate _____ Letters Testamentary (if in Probate) ____ Appraisal for Real Estate, other assets or business owned. ____ List of Assets Broker Statements _____ Prior Year tax returns of the Decedent ____ Tax Documents received. Copies of Bank Accounts and CD statements Recap of Income and Expenses since the date of death Expense Spreadsheet for Trustees expenditures Hourly Rate and amount of hours billed by Trustee