



CHRISTINE KRIEGER

Taxes & More

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ESTATE AND TRUST QUESTIONNAIRE

Decedent's Full Legal Name _____

Also Known As (Aliases) _____

Trust Name _____

Date of Death _____ Birth Date _____

Federal EIN _____ POA _____ Form 56 _____

Social Security Number _____ US Citizen? _____

Spouse's Full Legal Name _____

Also Known As (Aliases) _____

Marriage Date _____ Birth Date _____

Social Security Number _____ US Citizen? _____

Home Address _____

County of Residence _____

Year Residence Established in this State _____

Divorced _____ Widowed _____ Single _____ Provide information regarding the prior marriage. Please indicate below which of the children resulted from the prior marriage. Please indicate the nature of your relationship with the ex-spouse. (Good, bad, other-explain)

Information on Person Filling in Questionnaire:

Name	Address	Phone	E-mail

Other Information: _____

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

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

Referred By: _____

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
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____