

2019 Fiduciary General Information

Name and Address Information												
Employer ID number	1											
Estate/trust name	2											
In-care-of name	3											
Street address	4										Suite #	5
City	6											
U.S. ONLY	State, ZIP, County		7		8		9					
Foreign ONLY	Province/State, Country, Postal Code		10			11		12		Entity name control		13

Fiduciary Information												
	First name	Last name										
If an individual	14				15							
If a business	16											
Fiduciary title	17	Trustee	18	Executor	19	Executrix	Other	20				
Fiduciary SSN/EIN	21			22		Fiduciary is a financial institution that submitted estimated tax payments for trusts for which it is the trustee						
Phone number	23											

General Information					If not a calendar year	
A Type of entity - Mark all that apply					Fiscal begin	
24 Decedent's estate					53	
SSN					Fiscal end	
25					54	
Date of death						
26						
Name: First					Other Information	
27					Distribute all income	
Last					55	
28					Distribute NET capital gain	
29 Simple trust					56	
30 Complex trust					57	
31 Qualified disability					Carry the applicable amount of depreciation, depletion, and amortization to Schedules C, E, or F instead of line 9 of the beneficiary's Schedule K-1.	
32 ESBT (S only)					58	
33 Full Grantor					Resident state	
34 Partial Grantor					59	
35 Bankruptcy estate - Chapter 7					Firm number	
36 Bankruptcy estate - Chapter 11					60	
37 Pooled income fund					Preparer number	
38					61	
D Date entity created					ERO number	
					62	
E Nonexempt charitable and split-interest trusts. Mark applicable boxes:					Preparer fee	
39 Described in Section 4947(a)(1)					63	
40 Not a private foundation					Date closed/terminated	
41 Described in Section 4947(a)(2)					64	
F Mark applicable boxes:					Misc code 1	
42 Initial return					65	
43 Final return					Misc code 2	
44 Amended return					66	
46 NOL carryback					2210 Information	
47 Change in trust's name					2018 federal tax	
48 Change in fiduciary					67	
49 Change in fiduciary's name					2018 state tax	
50 Change in fiduciary's address					68	
G Estate or filing trust made a section 645 election						
51						
52 Trust EIN if 645 election						

Client information (for client reports only)			
Email	69		
Cell	70	Fax	71

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