

2020 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 25 Date of death 26				Fiscal end			
Name: First 27				54			
Last 28							

Other Information				
Distribute all income				55
Distribute NET capital gain				56
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.				57
Resident state				58
Firm number				59
Preparer number				60
ERO number				61
Preparer fee				62
Date closed/terminated				63
Misc code 1				64
Misc code 2				65
Invoice number				66

2210 Information				
2019 federal tax				67
2019 state tax				68

F Mark applicable boxes:		42 Initial return		43 Final return	
44 Amended return		46 NOL carryback		47 Change in trust's name	
48 Change in fiduciary		49 Change in fiduciary's name		50 Change in fiduciary's address	
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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