

# 2021 Fiduciary General Information

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

<b>Fiduciary Information</b>													
	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												

<b>General Information</b>					<b>If not a calendar year</b>				
<b>A</b> Type of entity - Mark all that apply					Fiscal begin 53				
24 Decedent's estate					Fiscal end 54				
SSN 25		Date of death 26							
Name: First 27									
Last 28									
29 Simple trust		30 Complex trust							
31 Qualified disability		32 ESBT (S only)							
33 Full Grantor		34 Partial Grantor							
35 Bankruptcy estate - Chapter 7		36 Bankruptcy estate - Chapter 11							
37 Pooled income fund									
<b>D</b> Date entity created 38									

<b>Other Information</b>									
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									

<b>F</b> Mark applicable boxes:					<b>2210 Information</b>				
42 Initial return		43 Final return			2020 federal tax 67				
44 Amended return					2020 state tax 68				
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							
<b>G</b> 51 Estate or filing trust made a section 645 election									
52		Trust EIN if 645 election							

<b>Client information (for client reports only)</b>				
Email	69			
Cell	70	Fax	71	

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