

2023 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 Calendar Year		
A Type of entity - Mark all that apply											Fiscal begin		54
24 Decedent's estate											Fiscal end		55
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 Required to distribute all income											34 Full Grantor		
35 Partial Grantor											36 Bankruptcy estate - Chapter 7		
37 Bankruptcy estate - Chapter 11											38 Pooled income fund		
D Date entity created											39		
E Nonexempt charitable and split-interest trusts. Mark applicable boxes:											Other Information		
40 Described in Section 4947(a)(1)											Distribute NET capital gain		56
41 Not a private foundation											Carry the applicable amount of depreciation, depletion, and amortization to Schedules C, E, or F instead of to line 9 of the beneficiary's Schedule K-1.		57
42 Described in Section 4947(a)(2)											Resident state		58
F Mark applicable boxes:											Firm number		59
43 Initial return											44 Final return		60
45 Amended return											46 Superseding		61
47 NOL carryback											49 Change in fiduciary		62
48 Change in trust's name											50 Change in fiduciary's name		63
50 Change in fiduciary's name											51 Change in fiduciary's address		64
G											Preparer number		65
52 Estate or filing trust made a section 645 election											ERO number		66
53 Trust EIN if 645 election											Preparer fee		67
											Date closed / terminated		68
											Misc code 1		
											Misc code 2		
											Invoice number		
											2210 Information		
											2022 federal tax		67
											2022 state tax		68

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

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