

2016 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		53				
24	Decedent's estate				Fiscal end		54					
SSN	25		Date of death	26		Other information						
Name: First	27				Distribute all income		55					
Last	28				Distribute NET capital gain		56					
29	Simple trust		30	Complex trust		Resident state		57				
31	Qualified disability		32	ESBT (S only)		Firm number		58				
33	Full Grantor		34	Partial Grantor		Preparer number		59				
35	Bankruptcy estate - Chapter 7		36	Bankruptcy estate - Chapter 11		ERO number		60				
37	Pooled income fund				Preparer fee		61					
D	Date entity created				38	Date closed/terminated		62				
E	39	Described in Section 4947(a)(1)				Misc code 1		63				
	40	Not a private foundation				Misc code 2		64				
	41	Described in Section 4947(a)(2)				Invoice number		65				
F Mark applicable boxes:						2210 Information						
42	Initial return		43	Final return		2015 federal tax		66				
44	Amended return				2015 state tax		67					
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		Client information (for client reports only)						
G	51	Estate or filing trust made a section 645 election				Email	68					
	52	Trust EIN if 645 election				Cell	69	Fax	70			

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