

2017 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

A Type of entity - Mark all that apply

24 Decedent's estate

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

D Date entity created 38

If not a calendar year

Fiscal begin 53

Fiscal end 54

Other Information

55 Distribute all income

56 Distribute NET capital gain

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

E Nonexempt charitable and split-interest trusts. Mark applicable boxes:

39 Described in Section 4947(a)(1)

40 Not a private foundation

41 Described in Section 4947(a)(2)

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

52 Trust EIN if 645 election

2210 Information

2016 federal tax 66

2016 state tax 67

Client information (for client reports only)

Email 68

Cell 69 Fax 70