

**2018 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

<input type="checkbox"/> 29 Simple trust	<input type="checkbox"/> 30 Complex trust
<input type="checkbox"/> 31 Qualified disability	<input type="checkbox"/> 32 ESBT (S only)
<input type="checkbox"/> 33 Full Grantor	<input type="checkbox"/> 34 Partial Grantor
<input type="checkbox"/> 35 Bankruptcy estate - Chapter 7	<input type="checkbox"/> 36 Bankruptcy estate - Chapter 11
<input type="checkbox"/> 37 Pooled income fund	

**D Date entity created**  38

**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**  51 Estate or filing trust made a section 645 election

52 Trust EIN if 645 election

**If not a calendar year**

Fiscal begin  53

Fiscal end  54

**Other Information**

Distribute all income  55

Distribute NET capital gain  56

Resident state  57

Firm number  58

Preparer number  59

ERO number  60

Preparer fee  61

Date closed/terminated  62

Misc code 1  63

Misc code 2  64

Invoice number  65

**2210 Information**

2017 federal tax  66

2017 state tax  67

**Client Information (for client reports only)**

Email  68

Cell  69

Fax  70

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