Estates & Trusts
Contact Sheet and Document Checklist

Name of Decedent/Trust:______________________________Date of Death:_________________________

Personal Representative/Trustee Name:____

Phone number:___________________________________Best time to contact:______________________

Has a tax identification number been applied for and/or assigned by IRS?__________________________

We will need copies of the following documents:

☐ copy of death certificate

☐ copy of will and/or trust

☐ copy of personal representative appointment paperwork (if applicable)

☐ copy of tax identification number assignment (SS-4) from IRS

☐ copy of decedent's last income tax return

Please provide the following:

1) A list of beneficiaries including names, addresses, social security numbers and percent of participation in the Estate/Trust.

2) A list of items of income and expenses related to the administration of the Estate/Trust. Please include all Forms 1099, etc. received.

3) If the decedent's residence was sold please provide the settlement (closing) statement.

4) Has the Estate/Trust been closed; ie, have all the assets been distributed (not including an amount set aside for final accounting/legal fees?

5) Any other information you feel is relevant.

Notes:____
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