

Estate & Trusts

Contact Sheet and Document Checklist

Name of Decedent/Trust: _____ Date of Death: _____

Personal Representative/Trustee: _____

Phone number: _____ Best time to contact: _____

Has a tax identification number been applied for and/or assigned by IRS? Yes No

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 the IRS
- Copy of Decedents Last Tax Return (if applicable)

Please provide the following:

- 1) A list of beneficiaries. Include 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 1099 Forms, etc. received.
- 3) If the decedent's residence was sold, provide the Settlement (closing) Statement.
- 4) Has the Estate/Trust been closed; i.e. 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 or questions: _____
