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Estates & 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: ____

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