



## \_\_\_\_\_ FIDUCIARY TAX QUESTIONNAIRE

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### GENERAL ESTATE OR TRUST INFORMATION

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**Legal Name**

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**EIN**

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**Year End**

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**Address**

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**City**

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**State**

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**Zip Code**

### BENEFICIARY INFORMATION

*Please provide detailed information about each beneficiary for the tax year. For every beneficiary, please provide their Full Name, Tax Identification Number (TIN) or Social Security Number (SSN), current Address, and their share of income/deductions.*

<b>Full Name</b>	<b>TIN/SSN</b>	<b>Address</b>	<b>Share %</b>

## ESTATE OR TRUST SPECIFIC QUESTIONS

*Please answer each of the following questions to the best of your knowledge.*

Is this tax return for an Estate?	<input type="radio"/> Yes	<input type="radio"/> No
Is this tax return for a Trust?	<input type="radio"/> Yes	<input type="radio"/> No
Is this a qualified revocable trust filing an original return that wishes to make a §645 Election to be taxed as an estate?	<input type="radio"/> Yes	<input type="radio"/> No
Is there a change in address or fiduciary name?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive tax-exempt income?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive all or any part of the earnings of a person?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive or pay seller-financed mortgage?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from self-employed small business?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from rental real estate?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from a partnership, S-corporation, trust or estate?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from an installment sale?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from the sale of stocks or bonds?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust receive income from interest or dividends?	<input type="radio"/> Yes	<input type="radio"/> No
Did the estate or trust sell property?	<input type="radio"/> Yes	<input type="radio"/> No
Did the trust/estate have ownership or control over a financial account in a foreign country?	<input type="radio"/> Yes	<input type="radio"/> No