

Decedent Estate Worksheet

Name of Estate - _____ **Tax Year** _____

Income

Interest (need statements): _____

Dividends (need statements): _____

1099-R (Retirement Income paid to estate) (Need forms): _____

Other Income: _____

Rental Income = Ask for rental worksheet – do not list rental income on here

Regular Expenses (Rental Income/Expenses must be on a separate rental worksheet form – do not list on here)

(You cannot deduct federal income, estate, inheritance, legacy, succession, gift, federal duties, and excise taxes. You also cannot deduct funeral or medical cost.)

Accounting Fees: _____

Attorney Fees: _____

Charitable Deductions (Need form): _____

Court Fees: _____

Fiduciary Fees (if not taken on a 706 Estate Tax return): _____

Interest Paid (who, how much, and for what): _____

Probate Fees: _____

Beneficiaries (If you put this info on our Information Form for Trust & Estate, then you don't have to put their social or address here, but do need the rest of the info.)

Name of each person, S.S. #, address, and percent of the estate they get. If they got a distribution, how much they got for the year.