

# Intake Form for a Decedent Estate

(New Clients)

Entity Name \_\_\_\_\_

Entity Address \_\_\_\_\_

\_\_\_\_\_

EIN \_\_\_\_\_ Deceased Date of Death \_\_\_\_\_

SSN for Deceased - \_\_\_\_\_

**Fiduciary Info:**

Executor/Trustee Name \_\_\_\_\_ S.S.# \_\_\_\_\_

(Person listed above is the one who will take care of taxes and sign them. Only one person can do it)

Title: \_\_\_\_\_ DOB (For E-Signature) \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

**Name, social security number, address, phone #, & % of interest for each beneficiary:**

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

4. \_\_\_\_\_

\_\_\_\_\_

5. \_\_\_\_\_

\_\_\_\_\_

# Information Sheet for a Decedent Estate

## Questions:

If an estate, was there a will? \_\_\_\_\_

If an estate, did the court appoint a personal representative? \_\_\_\_\_

If no personal representative, do you have a small estate affidavit? \_\_\_\_\_

Was the total value of the estate \$12,060,000 or more? \_\_\_\_\_

## Information needed for Decedent Estate Returns:

1. We need a copy of the IRS EIN Letter;
2. We a copy of the death certificate;
3. We need a copy of the Will (If there was one);
4. We need a copy of the court qualification letter or small estate affidavit
5. If this is not your first year filing, we need a copy of last year's tax return (both federal and state);

## Important information:

1. If your estate value is 1 million or higher, (Except for those living in NJ, then it is \$675,000 or higher) we must discuss possible estate taxes or strategies that are important to implement in the year of passing.