Intake Form for Trusts

(New Clients)

Entity Name ____

Entity Address____

____

EIN____________________ Date Trust was Created ______________

Fiduciary Info:
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 ____

Check one: ___Irrevocable Trust

___Qualified Disability Trust ___Revocable Trust

___Grantor Type Trust ___Other Trust

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

1. ____

____

2. ____

____

3. ____

____

4. ____

____

5. ____

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Information Sheet for Trusts

Information needed for Trusts:

1. We need a copy of the IRS EIN Letter;
2. We need a copy of the Trust Document (latest version);
3. If this is not your first year filing, we need a copy of last year's tax return (both federal and state);