

Please let us know if of these apply!

Estate/Trust Name _____ Tax Year 2023

1. At any point during 2023, did the estate or trust sell or exchange any interest in any Virtual Currency? (Example: Bitcoin)

Yes or No _____

Questions below, please let us know if these changed since you last filed a return:

2. Was there a change in trustee, executor, or administrator since you last filed?

Yes or No _____

3. Does the Trust/Estate have a different mailing address from last year's tax filed is applicable?

Yes or No _____

4. Is this a final return (meaning the estate or trust was closed as of December 31st of the tax year we are preparing)? **Yes or No** _____

5. Is there a change of any beneficiaries since a previously filed return?

Yes or No _____

6. Did you buy/sell any homes for the decedent or in the trust? **Yes or No** _____

7. Have you brought in taxes for any entity or person other than the trust/estate?

Yes or No _____

8. At any time during the year, did this entity have an interest in or a signature or other authority over a financial account in a foreign country?

Yes or No _____

9. Did the estate or trust own any foreign assets during the year?

Yes or No _____

10. Is there any business owned that feed into the estate or that is part of the trust?

Yes or No _____ (If yes, you must fill out extra paperwork for that)

11. Did the Trust/Estate receive any money from a seller financed mortgage (*This means the estate or trust sold something and the estate or trust is holding the loan and getting paid by the person you sold it to*)?

Yes or No _____

For Trust Only:

12. Have you amended the trust document since the end of the last filing year?

Yes or No _____

13. Were any assets transferred into the trust during the year? **Yes or No** _____