

Estate and Trust - Form 1041 Questionnaire

Please check the appropriate box and include all necessary details and documentation

Return Information

Did the estate or trust receive correspondence from a state taxing authority of the Internal Revenue Service regarding a prior year return? If yes, please include a copy in not already provided

Have there been any changes regarding the personal representative/trustee?

If decedent's estate, has estate been open more than 2 years? If yes, explain delay below

Are there any new beneficiaries this year? If yes, complete the beneficiary information section of the enclosed organizer.

Have there been any changes to beneficiary names or addresses? If yes, complete the beneficiary information section of the enclosed organizer.

Have there been any changes to how income should be allocated to beneficiaries? If yes, explain below.

Yes	No

Income Information – please include details for all “Yes” answers

Did the estate or trust acquire or dispose of any stock or partnership interest during the year?

Did the estate or trust purchase rental property during the year?

Did the estate or trust sell, exchange, or purchase any real estate during the year?

Did the estate or trust sell an existing business, rental or other property this year?

Did the estate or trust receive any payments from property sold prior to this year?

Did the estate or trust receive any payments from an annuity, pension or other retirement plan?

Did the estate or trust receive any gambling or lottery winnings?

Did the estate or trust incur a casualty or theft loss during the year?

Foreign Activity

Did the estate or trust hold an interest in a foreign entity?

Did the estate or trust have any foreign income or pay any foreign taxes, directly or indirectly, from investment accounts or pass-through entities?

Did the estate or trust have an interest in or a signature authority over a financial account (such as a bank account or brokerage) in a foreign country?

Did the estate or trust receive a distribution from, or transfer assets to, a foreign trust?

Other Information

Is this the final tax return for the estate or trust?

If yes, have all the assets of the estate or trust been distributed?

Have you signed and included the engagement letter?

Have you included the organizer?

Do you want us to provide a copy of the return to anyone else? (e.g. attorney) If yes, please indicate the name and address below:

Name: _____

Mailing Address or email: _____

Notes and explanations: