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? ____________________

Is Estate a Calander year filer or Fiscal Year Filer? ____________________________

If Fiscal Year, what is the Fiscal Year _______________________________________

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.