

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. _____

Trust Name: _____

Is Trust a Calander year filer or Fiscal Year Filer? _____

If Fiscal Year, what is the Fiscal Year _____

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);