<u>Information Needed for your 2016 Trust/Estate Form 1041 Tax Returns</u>

Please send us your information using File Exchange on your client portal. If you prefer to drop off your information, please provide us your original documents instead of copies (we will return your originals with your completed tax return). To assist us with scanning & storing your documents efficiently, please use paperclips instead of stapling items together.

Below is a list of information we will need (if applicable) to begin the preparation of your tax returns:

- Will the address on your current returns be different from that shown on your prior year returns? If yes, provide the new address and date moved.
- Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country?
- Were you a resident of, did you receive income from, or own property in more than one state during the year?
- Do you want any overpayment of taxes applied to next year's estimated taxes?
- Did you have foreign income or pay any foreign taxes?
- Has the IRS, any state or local taxing agency notified you of changes to a prior year's tax return?
- Provide copies of all notices/correspondence received from any tax agency.
- Are you aware of any changes to your income, deductions and credits reported on a prior year's returns?
- Were you the grantor, transferor or beneficiary of a foreign trust? If yes, provide details.
- Were any distributions made to beneficiaries during the tax year or 65 days following year end?
- Has there been a change in trustee(s)? If yes, provide new trustee(s) information.
- Has there been a change in beneficiaries? If yes, provide new beneficiaries information (full name, social security number, address and % shareholder of trust)