



Questions (Page 1 of 2)

- 1. Is there a new fiduciary?
2. Has the trustee or executor changed?
3. Has the trustee's/executor's address changed?
4. Did you receive correspondence from the IRS or any state taxing authority?
5. Do you maintain a bank account for the trust?
6. Have you received any foreign income or paid any foreign taxes?
7. Is this the initial year for the trust/estate?
8. Is this the final year of the trust/estate?
9. Was the estate or trust the grantor or transferor to a foreign trust which existed during the year?
10. At any time during the tax year, did the estate or trust have an interest in or a signature or other authority over a financial account in a foreign country?
11. Did you receive any distributions from foreign trusts?
12. Does the estate or trust have an interest in a partnership, S corporation, or another estate/trust?
13. Did you receive any tax refunds from any state taxing authority?
14. Did the estate or trust receive any income or contribution not reported on this organizer?



- | | Yes | No |
|--|--------------------------|--------------------------|
| 15. Has there been a sale, purchase, or exchange of real estate?
If yes, please provide a copy of the settlement sheet. | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Did you purchase any bonds this year?
If yes, please provide a copy of the purchase confirmation slip. | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Did the estate or trust pay any taxes (other than income taxes)?
If yes, please provide the amount and details. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Did this estate or trust pay any mortgage or investment interest?
If yes, please describe the nature and amount.

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Were any fiduciary fees paid?
If yes, please describe the nature and amount.

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Were any attorney fees paid?
If yes, please describe the nature and amount.

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. Have there been any contributions made to a charitable organization?
If yes, please provide the name of the charity and amount.

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Have there been any other disbursements not previously provided?
If yes, please describe the nature and amount.

_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. May the IRS or other taxing authority discuss the return with the preparer? | <input type="checkbox"/> | <input type="checkbox"/> |