HAGEN·CPA LLC

ESTATE OR TRUST SET-UP CHECKLIST

- **<u>Completed</u>** New Client Intake Form
- SS-4
- Copy of Trust or Estate Legal Document/ Agreement and Will
- Prior two years tax returns (1041), *if any*
- Full inventory sheet of all assets, income, expenses, distribution, etc.
- Decedent's Information
  - Full Name
  - Last Address
  - Social Security Number
  - Death Certificate
  - Copy of final personal tax return (1040)
- Executor/ Trustee's Information:
  - Name
  - Address
  - Social Security Number
  - Copy of Driver's License
- Beneficiary Information *(need for all beneficiaries)*:
  - Name
  - Address
  - Social Security Number
  - Citizenship
  - Each beneficiary's share of income and distributions

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