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INCOME TAX RETURN FOR AN ESTATE (FORM 1041) - Tax year 2025

Estate	
Name	=
Tax ID (EIN)	=
Address	=
Tax year selected	=
Probate US state	=
Probate - date open	=
Initial estate income return (YES/ NO)	=
Final estate income return (YES / NO)	=
Attach the following documents	1/ IRS CP575B 2/ Will 3/ Death certificate 4/ Probate documents 5/ Estate bank statements 6/ Form 706

Decedent	
Name	=
Tax ID (SSN)	=
Date of Death	=
Unpaid income (wages, retirement, etc)	= \$

Executor / Fiduciary / Personal Representative	
Name	=
Address	=
Tax ID (SSN / ITIN)	=
Date of appointment	=
Attach Letters Testamentary / administration	=
Form 56 on file with the IRS? (YES/ NO)	=

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Tax Professional



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Beneficiary #1		Beneficiary #2	
Name	=	Name	=
Relationship	=	Relationship	=
Address	=	Address	=
SSN / ITIN	=	SSN / ITIN	=
Domestic / Foreign	=	Domestic / Foreign	=
% inheritance	=	% inheritance	=

If more than 2 beneficiaries, please provide the information on an additional separate sheet

Income		Deductions	
Real estate Sale	=\$	Fiduciary fees	=\$
Rental income	=\$	Legal/accounting fees	=\$
Interest income	=\$	Charitable payments	=\$
Dividend income	=\$	Administration expenses	=\$
Retirement income	=\$	Appraisal fees	=\$
Other asset sold	=\$	Property insurance	=\$
Other income	=\$	Property tax	=\$
State where income is earned	=	Other deductions	=\$

Distributions - include amount for EACH beneficiary:		Payments & credits	
Amount required to be distributed	=\$	Federal withholding	=\$
Amount actually distributed	=\$	State tax payment	=\$
Amount credited during the year	=\$	Estimated tax payment	=\$
Discretionary distributions	=\$		
Cash distributions	=\$	Foreign activity	
Property distributions	=\$	Foreign income	=\$
In kind distributions	=\$	Foreign assets	=\$
Income distributions	=\$	Foreign tax credit	=\$
		Foreign bank accounts	=\$
		Foreign beneficiaries	=\$
		Digital assets	=\$

Other info	
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To the best of my knowledge, the information in this tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. The information in this document has been read and explained to me in a language that I understand.

Name, Signature, Date _____

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