



### Basic Info

- Will or trust instrument
  - Name and EIN of the estate or trust
  - Name, title and address of the fiduciary
  - Last year's return
  - Estimated taxes paid
  - Beneficiary's name, address and SSN/EIN
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### Documents Received

- Form W-2s – wage and tax statements
- Form 1099s – includes miscellaneous income, interest income, dividend income, unemployment compensations and retirement plan distribution
- Form 1099-Ks – payment card and third party network transactions
- Form 2439s – notice to shareholder of undistributed long-term capital gains
- Schedule K-1s – partnership, S Corporation and trust income

### Personal Records

- Charitable contributions
- Business or employee expenses
- Gambling expenses
- Investment transactions

### E-file/Print

- Bank information (account and routing number for direct withdrawal)

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**Deadline to File: 4/15; if extended, the new due date is 9/30**

If you would like us to file an extension on your behalf, let us know two weeks before the first quarter deadline.  
**Please have all documents to us a minimum of four weeks prior to the due date.**