## 2024 Tax Organizer for Estates and Trusts General and Fiduciary Information

General Information								
Estate or trust name						EIN		
In care of name					Entity name cor	ntrol		
Street address, city, state	Street address, city, state, and ZIP							
Yes No								
	or trust file under a	calendar y	/ear?					
If "No," what	is the tax year beg	jin date?		Tax year end d	late?		_	
· · · · · · · · · · · · · · · · · · ·	lect all that apply):		☐ 0:t		По-		_4	
=	nt's estate I disability trust		☐ Simple trust	all business trust (ESBT	_	nplex tru ntor type		
_	tcy estate (chapter	.7)	=	estate (chapter 11)		led incor		
			following information	•				
	name							
SSN	iciaries did the est		e of death have during the tax y					
Date entity create		ate or trust	mave during the tax y		-			
		instrumen	t require all income to	be distributed?				
_ = _	nexempt charitable							
<del>_</del> _	filing trust make a ide the trust's EIN.		5 election?					
	ide the trust's Lin.							
Fiduciary Information								
First and last name (if an	individual)							_
Business name (if a busin	ness)				_			
Fiduciary ID Number		PI	hone number					
Cell number		Fa	ax number					
Email								
Yes No								
☐ ☐ Is the fiduciary a  What is the fiduc		that submi	itted estimated tax pa	yments for the trust for	which it is the trust	ee?		
Trustee	Executor	☐ Exe	cutrix Other					
Estimates								
	Fe	deral		Resident State		Res	ident City	
Overpayment applied	Date Paid	An	mount Da	te Paid Amo	unt Da	ate Paid		Amount
from 2023		_						
First quarter	_							_
Second quarter								
Third quarter			<u>_</u>					
Fourth quarter								
Additional payments	_							
Account Information for Deposits and Withdrawals								
			Bank	Bank	Type of Accour	nt	Use This A	Account for
Name	of Bank		Routing Number	Account Number	Checking Sav	rings	Deposits	Withdrawals

ID Number Distributions if any Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary Distributions if any Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary Distributions if any Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  From Foreign beneficiary Distributions if any Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  From Foreign beneficiary Distributions if any Name  Street address  City Phone  From Foreign beneficiary Distributions if any Name  Street address  City Phone  From Foreign beneficiary Distributions if any Name  Street address  City Phone  From From From Foreign beneficiary Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email			Beneficiary's and Other Information		
Foreign beneficiary   Distributions if any   Phone	Estate or Trust N	lame:		EI	N:
Distributions if any   Name   Street address	Beneficiary I	nformation			
Street address  City	Foreign bene	eficiary		Fed %	State %
Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State Country, Postal code  Email  Foreign beneficiary Phone  Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State Country, Postal code  Email  Foreign beneficiary Phone  U.S. only State, ZIP  Foreign only Province/ State Country, Postal code  Email  Foreign beneficiary Distributions if any  Name  Street address  City Phone  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary Distributions if any  Name  Street address  City Phone  Foreign only Province/ State, Country, Postal code  Email  Foreign only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary Distributions if any  Name  Street address  City Phone  Province/ State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign State, ZIP  Foreign only Province/ State, Country, Postal code  Email  From Phone  Province/ State, ZIP  Foreign only Province/ State, Country, Postal code  City Phone  Province/ State, ZIP  Foreign only State, ZIP  Province/ State, ZIP  Foreign only Province/ State, Country, Postal code  City Phone  Province/ State, ZIP  Foreign only Province/ State, Country, Postal code	ID Number		Distributions if any		
City	Name				
U.S. only State, ZIP Foreign only Country, Postal code Email    Foreign beneficiary   Distributions if any	Street address				
Foreign only Country, Postal code  Email  Foreign beneficiary Distributions if any  Name  Street address  City	City		Phone	_	
Country, Postal code  Email  Foreign beneficiary  Fed % State % ID Number  Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary  Distributions if any  Name  Street address  City Phone  Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary  Fed % State %	U.S. only	State, ZIP			
Email  Foreign beneficiary  Distributions if any  Name  Street address  City  Phone  Province/ State  City  Phone  Fed % State % St	Foreign only	Province/ State, Country, Postal code			
D Number   Distributions if any   Name   Street address   Phone   Street address   Phone   Street address   Phone   State, ZIP   Province/ State, Country, Postal code   Pending   Province/ State, ZIP   Province/ State, ZIP   Province/ State, ZIP   Phone   Street address   Phone   Pho	Email				
Name Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Foreign beneficiary Fed % State %  ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Fed % State %  State %  State %  Fed % State %  State %  State %  Fed % State %  State %  State %  State %  Phone  U.S. only State, ZIP  Foreign beneficiary Fed % State %  ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only State, ZIP  Foreign only State, ZIP  Foreign only State, ZIP  Foreign only Province/ State, Country, Postal code	Foreign bene	eficiary		Fed %	State %
Street address  City	ID Number		Distributions if any		
City	Name				
City					
U.S. only State, ZIP					
Foreign only Province/ State, Country, Postal code  Email  Fed % State					
Fred % State %  ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email  Fed % State %  Phone  U.S. only State, ZIP  Foreign beneficiary Fed % State %  ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Fred % State %  Fed %	Foreign only	Province/ State			
Fed % State % State % Street address  City Phone U.S. only State, ZIP  Foreign beneficiary Fed % State % State % State only Phone  Email Foreign beneficiary Fed % State % State only Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code Email Fed % State % State only Phone  U.S. only State, ZIP  From Province State, Country, Postal code Email Fed % State % State % State % State only Phone  U.S. only State, ZIP  From Phone Foreign only Province/ State, Country, Postal code Email Foreign only Province State, Country, Postal code	Email	•			
ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code  Email    Foreign beneficiary					
Street address   Street address   Street address   Street address   Street address   Street address   State, ZIP   State, ZIP   Street address   Street addre	Foreign bene	eficiary		Fed %	State %
Street address  City	ID Number		Distributions if any		
City         Phone           U.S. only         State, ZIP           Foreign only         Province/ State, Country, Postal code           Email         Fed %         State %           ID Number         Distributions if any         Phone           Name         Street address         Phone           U.S. only         State, ZIP           Foreign only         Province/ State, Country, Postal code	Name				
U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code Email  Fed % State % ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	Street address				
Foreign only Country, Postal code  Email  Foreign beneficiary  Fed % State % State % Street address  City Phone  U.S. only  Province/ State, Country, Postal code  Province/ State, Country, Postal code  Province/ State, Country, Postal code	City		Phone		
Email  Foreign beneficiary  Fed % State % State % Street address  City Phone  U.S. only  Province/ State, Country, Postal code	U.S. only	State, ZIP			
Foreign beneficiary  ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	Foreign only	Province/ State, Country, Postal code			
ID Number Distributions if any  Name  Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	Email				
Name Street address  City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	Foreign bene	eficiary		Fed %	State %
Street address  CityPhone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	ID Number		Distributions if any		
City Phone  U.S. only State, ZIP  Foreign only Province/ State, Country, Postal code	Name				
U.S. only  State, ZIP  Foreign only  Province/ State, Country, Postal code	Street address				
Foreign only Province/ State, Country, Postal code	City		Phone		
Country, Postal code ————————————————————————————————————	U.S. only	State, ZIP			
	Foreign only	Province/ State, Country, Postal code			
	Email				

Income	
Estate or Trust Name:	N:
Wages & Salaries	
Provide all copies of Form W-2	
Employer Name	2024 Amount
	<del></del>
	<del></del>
	<u> </u>
Retirement	
Provide all copies of Form 1099-R	
Payer Name	2024 Amount
	·
	. <u> </u>
Miscellaneous Income	
Provide all copies of Form 1099's	
Payer Name	2024 Amount
- ayo. Hamo	
	<del></del>
	· — —
	·
	·

# 2024 **Dividend & Interest Income** Estate or Trust Name: EIN: **Dividend Income** Provide all copies of Form 1099-DIV and other statements that report dividend income. Tax-Exempt Dividends Ordinary Dividends **Payer Name Interest Income** Provide all copies of Form 1099-INT, Form 1099-OID and other statements that report interest income. Account Number Payer Name Tax-Exempt Interest Interest

If any interest income listed above is from a seller-financed mortgage, provide the payer's ID number and address

### Sale of Capital Assets

Sale	e of Capital As	sets		
Estate or Trust Name:				EIN:
Sale of Capital Assets (including assets not reported on	Form 1099-B)			
Provide all brokerage statements  Description of Property	Date Purchased	Date Sold	Sales Price	Cost or Basis
			<del>.</del>	-
			<del>.</del>	
			<del>.</del>	
-				
				·
				·
		<del></del>		·
Installment Sale Income				
Description of property:				
Date acquired Date sold			2024	Prior years
Selling price				<b>,</b>
Mortgages assumed				
Cost of property sold				
Depreciation allowed				
Commissions and expense of sale				
Gross profit percentage				
Interst received				
Principal payments received				
Property was sold to a related party				

#### Schedule E - Income or Loss from Rental Real Estate & Royalties EIN: Estate or Trust Name: **General Property Information** Grantor Property description Address, city, state, ZIP Select the property type Single family residence Vacation / short-term rental Land Self-rental Multi-family residence Commercial Royalties Other Number of days property was rented Number of days property was used for personal use If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied This property was placed in service during 2024. Yes Payments of \$600 or more were paid to an individual, who is This property was disposed of during 2024. not your employee, for services provided for this rental. This property is your main home or second home. If "Yes," did you file Forms 1099 for the individuals? This property was owned as a qualified joint venture. Income 2024 2024 Royalties from oil, gas, **Expenses Rental Unit** Rental and Homeowner **Expenses Expenses** Advertising If this Schedule E is for a a multi-unit dwelling and you Auto & travel lived in one unit and rented Cleaning & maintenance out the other units, use the "Rental and homeowner Commissions expenses" column to show expenses that apply to the entire property. Use the "Rental unit Legal & professional fees expenses" column to show Management fees expenses that pertain ONLY to the rental portion of the property. Mortgage interest Other interest If the Schedule E is not for a multi-unit property in which you Repairs lived in one unit, complete just the "Rental unit expenses" column. Other expenses

## **Asset Listing for 2024**

Estate or Trust Name: EIN:

Assets for:					
Description of Property	Date Acquired	Cost / Basis	Date Disposed of	Sales Price	Expense of Sale

## Income or Loss from Investments in Partnerships, S Corporations, and Fiduciaries

Estate or Trust Name: EIN
---------------------------

Schedule K-1 from Partnerships, S Corporations, Estates and Trusts	
Provide all copies of Schedule K-1 and attachments	
Entity Name	EIN
	<del></del>
	_
	<del></del>
	_
	<del></del>