WHAT TO BRING TO YOUR TRUST TAX APPOINTMENT

- In addition to the items need for an Individual Return we will also need:
- Death Certificate (original)
- Trust Documents (complete, including all amendments)
- If you have obtained a Tax Identification Number for the Trust, bring the IRS letter telling you the number with you. If not, we will get one while we meet.
- Bank statements and brokerage statements for ALL financial assets held at the time of death.
- List of all financial assets owned at the time of death.
- Bank statements and other financial statements for the month of death.
- All 1099's, W-2 forms, mortgage statements, medical bills, if doing an individual return also, property tax paid, contributions, DMV, medical insurance paid.