

Felhofer CPA sc

Estate or Trust Document Requirement List

- Trust Agreement, signed with attachments
- Beneficiary List: name, address, cell, email, SS#, DOB
- Inventory Listing (google sheet preferred)
- Appraisals, if any
- Brokerage Statement as of date of death
- Bank Statement as of date of death
- Death Certificate
- Contact information for your attorney
- Last 1040 filed and accepted by IRS
- EIN acceptance letter from the IRS