CHECKLIST OF INFORMATION NEEDED FOR FORM 1041

ESTATE/TRUST____

DATE OF DEATH____________________________

- ☐ A copy of the will.
- ☐ A copy of the community property agreement.
- ☐ A copy of the trust document. (If testamentary trust, the will may be trust document.)
- ☐ Copy of the letters testamentary (the appointment of the personal representative if a probate is opened for the estate.
- ☐ A copy (need not be certified) of the death certificate.
- ☐ Federal Identification Number assigned to the trust and/or the estate. If a revocable living trust, an estate FIN may be needed to use a fiscal year for tax purposes.
- ☐ A list of the beneficiaries including addresses, Social Security numbers and amounts of any specific bequests and/or percentage of residue for each. (Social Security numbers are not required for beneficiaries that receive only specific bequest.)
- ☐ A copy of the last personal income tax return filed on behalf of the decedent. (If and estate or copy of the last Form 1041 filed by the trust (if a trust).
- ☐ A copy of the inventory of the trust or estate.
- ☐ A list of assets owned, but held outside the State of Washington, if not included in the inventory.
- ☐ A list of any life insurance owned by the decedent, if not included in the inventory.
- ☐ A copy of the accounting for the estate or trust for the current fiscal year, if one is prepared. If not, a copy of the check register, bank statements and brokerage statements for the current fiscal year.
- ☐ For the final year of the estate of trust, a list of expenses/distributions to be paid at closing.
- ☐ A copy of the Declaration of Completion (or other court closing document), if an estate.