# 2021 Trust/Estate Checklist

Please complete the checklist.
Upload tax documents securely to TaxCaddy or
kirschcpa.safesend.com/DropOff.aspx

| | | |
|---|---|---|
| **Name of the estate or trust** | **EIN of the estate or trust** | **Best Phone#:** |
| Name of the fiduciary | Title | **Email:** |
| Address of the Fiduciary: | City, State: | Zip: |

☐ I authorize Kirsch CPA Group to text questions to the listed phone# above.

☐ Interest Income was earned

- Provide a copy of 1099-INT form

☐ Trust assets were sold in 2021

- For home sale transactions, provide the escrow paperwork. This will include the final settlement statement, and possibly other documents such as a 1099-S, and CA 593.
- For stock or securities sales, provide the broker statements. Forms are 1099-INT, 1099-DIV, and 1099-B.

☐ Income was earned by the assets in the Trust

- Rental property, provide income and expenses
- Investment Income, provide 1099-INT statements
- Dividends & Capital Gains, provide 1099-DIV and/or 1099-B statements

☐ Expenses for the Trust were incurred during 2021

- Provide a list of expenses for the trust, such as notary fees, attorney fees, bookkeeping or other services

☐ Distributions to beneficiaries during 2021

- Provide a list of total distributions made to each beneficiary

☐ Do you have an attorney assisting you with the trust?

- Send copies of any attorney letters that provide instructions for the trust's tax return.

Upload all Documents to TaxCaddy or kirschcpa.safesend.com/DropOff.aspx by March 14, 2022
Questions? Contact us (513)858-6040