



Donovan CPAs

New Estates & Trusts Client Information

Base rate for Estate & Trust tax return is \$600

Date _____

Referred by _____ EIN # _____

Entity Type

Estate _____ Grantor Trust _____ Simple Trust _____ Complex Trust _____ Other _____

Entity Name: _____

Fiduciary Name: _____

Fiduciary Title: _____

Date of Death _____

Contact / Attention: _____

Address: _____

City/State/Zip: _____

County: _____

Phone: _____ - _____ - _____ Cell: _____ - _____ - _____

Email: _____

Would you like to receive text message Notifications? Yes _____ No _____

Cell Phone # _____ - _____ - _____

Spouse Cell Phone # _____ - _____ - _____

Additional Information

Beneficiaries:

Name: _____

Address: _____

City/State/Zip: _____

SSN: _____

EIN: _____

Please provide our office the following documents:

- Trust Documents (Relevant Sections)
- Will (Estate)
- Copy of IRS Notification (if available)
- Prior Year Tax Return (if available)

FOR INTERNAL USE ONLY

Tax Service

Calendar Year: _____

Fiscal Year End: _____

Prior Year Return: _____

IRS Control #: _____

Primary Contact: _____

Billing Manager: _____

Preparer: _____

Reviewer: _____

Client Classification: _____

Other Related Entities

Individual _____ Trust _____ Estate _____ LLC/Partnership _____ Other _____

Is this a group return? Yes _____ No _____

Bill together? Yes _____ No _____

If yes, list of related returns: _____