

*Updegrove, McDaniel, McMullen & Chiccehitto, PLC*  
**2020 FIDUCIARY TAX QUESTIONNAIRE (FORM 1041)**

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Estate/Trust Name \_\_\_\_\_

Executor/Trustee Name \_\_\_\_\_

Address \_\_\_\_\_

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Please answer the following questions and provide any requested information.

- |  | <u>Yes</u> | <u>No</u> |
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| 1. Is the address, beneficiary information, executor/trustee information or any other information different from that shown on your prior year returns? <i>(Please explain.)</i>   |            |           |
| 2. Did the estate or trust have an interest in, or a signature or other authority over a bank, securities, or other financial account in a foreign country?  |            |           |
| 3. Did the estate or trust receive tax-exempt income?  |            |           |
| 4. Did the estate or trust receive all or any part of the earnings (salary, wages and other compensation) of any individual by reason of a contract assignment or similar arrangement?   |            |           |
| 5. Has the IRS or any state or local taxing agency notified you of changes to a prior year's tax return? <i>(Provide copies of all notices/correspondence received from any tax agency.)</i>                                   |            |           |
| 6. Were you the grantor, transferor, or beneficiary of a foreign trust?  |            |           |
| 7. Were any distributions made, or are any to be made, to beneficiaries during the tax year or 65 days following year end? <i>(Provide details.)</i>   |            |           |
| 8. Were any executor or trustee fees paid? <i>(If applicable, prepare and provide copies of the 1099's.)</i> Please make sure you have mailed all the necessary 1099's to the recipients by the filing deadline of 01/31/2021. |            |           |
| 9. Were any estimated tax payments made? <i>(Provide dates and amounts.)</i>   |            |           |
| 10. Do you anticipate next year's income and expenses to be similar to this year's? If not, please explain.  |            |           |
| 11. Is this a final return?  |            |           |
| 12. Are there any other changes? If yes, please describe.  |            |           |

Additional Notes:

Once you receive your 1099's and/or have a detailed account of the 2020 income and expenses for the estate or trust, please send that information to us. Please return this questionnaire with your engagement letter. Thank you.