Updegrove, McDaniel, McMullen & Chiccehitto, PLC

2022 FIDUCIARY TAX QUESTIONNAIRE (FORM 1041)

Estate/Trust Name____

Executor/Trustee Name______________________________________

Address ____

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Email __________________________________

Please answer the following questions and provide any requested information.	Yes	No
1. Is the address, beneficiary information, executor/trustee information or any other information different from that shown on your prior year returns? *(Please explain.)*	☐	☐
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? *(Provide copies of all notices/correspondence received from any tax agency.)*	☐	☐
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? *(Provide details.)*	☐	☐
8. Were any executor or trustee fees paid? *(If applicable, prepare and provide copies of the 1099's.)* Please make sure you have mailed all the necessary 1099's to the recipients by the filing deadline of 01/31/2023.	☐	☐
9. Were any estimated tax payments made? *(Provide dates and amounts.)*	☐	☐
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 2022 income and expenses for the estate or trust, please send that information to us. Please return this questionnaire with your engagement letter. Thank you.