

Updegrove, McDaniel, McMullen & Chiccehitto, PLC
2023 FIDUCIARY TAX QUESTIONNAIRE (FORM 1041)

Estate/Trust Name _____
Executor/Trustee Name _____
Address _____
Phone _____
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? <i>(Please explain.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 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? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Did the estate or trust receive tax-exempt income? | <input type="checkbox"/> | <input type="checkbox"/> |
| 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? | <input type="checkbox"/> | <input type="checkbox"/> |
| 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> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Were you the grantor, transferor, or beneficiary of a foreign trust? | <input type="checkbox"/> | <input type="checkbox"/> |
| 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> | <input type="checkbox"/> | <input type="checkbox"/> |
| 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 01/31/2024. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Were any estimated tax payments made? <i>(Provide dates and amounts.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Do you anticipate next year's income and expenses to be similar to this year's? If not, please explain. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Is this a final return? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Are there any other changes? If yes, please describe. | <input type="checkbox"/> | <input type="checkbox"/> |

Additional Notes:

Once you receive your 1099's and/or have a detailed account of the 2023 income and expenses for the estate or trust, please send that information to us. Please return this questionnaire with your tax information. Thank you.