WHAT TO BRING TO YOUR INITIAL INTERVIEW – FIDUCIARY/TRUST/GIFT

Thank you for choosing Tax & Financial Solutions to prepare your tax return this year. We are highly experienced and qualified tax professionals who know all the latest tax law changes. We will take the time and effort to analyze your specific tax circumstances to identify potential tax deductions and recommend tax saving strategies.

To ensure the preparation of your tax return goes smoothly, please bring the following items to your scheduled tax appointment.

FIDUCIARY/TRUST

- TRUST DOCUMENT
- WILL
- PROBATE DOCUMENTS
- COPY OF DEATH CERTIFICATE
- COPIES OF ANY ATTORNEY PAPER WORK
- TAX ID NUMBER (IF THE ATTORNEY APPLIED FOR IT)
- LETTERS TESTAMENTARY
- INVENTORY
- LIST OF ANY AND ALL ASSETS OWNED BY THE ESTATE OR TRUST, INCLUDING VALUATIONS AND STATEMENTS VERIFYING ASSETS
- LIST OF ALL INCOME AND EXPENSE INFORMATION INCURRED DURING THE ESTATE OR TRUST ADMINISTRATION PERIOD, INCLUDING COPY OF CHECK REGISTER SHOWING MONIES IN AND OUT
- ANY TAX DOCUMENTS ADDRESSED TO THE DECEASED

GIFT

If you are an individual who has made a taxable gift of property, ideally you would schedule your appointment **prior** to completing your gift to come up with an appropriate strategy, which could possibly avoid the need to file a gift tax return.

- Documentation to clearly identify the property that you wish to gift, if applicable
- Deed for Real Property
- Stock Certificates if a gift of stock
- Anything you have which would help to establish the value of the property