



CERTIFIED PUBLIC ACCOUNTANTS

360 East Center Street
Manchester, CT 06040
Phone: 860 646.2465
Fax: 860 643.4858
www.borgidacpas.com

Peter S. Bartolotta, CPA
Aaron L. Johnson, CPA
Thomas F. Scanlon, CPA, CFP®

Estate & Trust Checklist

The below items are required to complete an Estate or Trust Tax Return Form 1041 (if applicable):

- ❖ Contact name, title, phone & email
- ❖ Copy of the Death Certificate
- ❖ Copy of Last Will & Testament
- ❖ Probate Inventory
- ❖ Probate Accounting
- ❖ Decedent's final 1040 filed
- ❖ Form SS-4 for Estate (Application for Federal ID Number)
- ❖ Notification from IRS with Federal ID Number
- ❖ List of beneficiaries with signed W-9 forms
- ❖ Summary of receipts & disbursements from checkbook
- ❖ 1099s associated with the Estate
- ❖ All other documents pertaining to the Estate

- ❖ CT-706 NT / 709 (Connecticut Estate Tax Return) to be done by Attorney and filed with Probate Court

Next Steps:

We will schedule a meeting for you to meet with one of our team members to review your situation.

We will issue you a work authorization/letter of engagement for your signature prior to commencing work on your return.

If you have any questions, please feel free to contact us for further details.

Borgida & Company, P.C.