Murphy & Company, LLC
Certified Public Accountants | Business Advisors

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 Fiduciary appointment by the Probate Court
- 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 (full name, address, social security number)
- 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 partners or staff accountants 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.

Murphy & Company CPAs, LLC

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