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# CHECKLIST OF INITIAL DOCUMENT REQUEST
UPON ENGAGEMENT FOR **ESTATE** *INCOME* TAX RETURNS (AND FINAL 1040/STATE RETURNS)

**ESTATE NAME**:
**DATE OF DEATH**:

RECEIVED

☐ 1. Decedent's Social Security #:

☐ 2. Estate Tax ID #:
(with copy of SS-4 application and/or response letter from IRS assigning #)

☐ 3. Form 13, Massachusetts (or other State's) Fiscal Election, if filed

☐ 4. Decedent's last 3 years Federal and State Income Tax Returns (one year at minimum)

☐ 5. Copy of death certificate

☐ 6. Copy of court appointment

☐ 7. Copy of will

☐ 8. Copy of Inventory (list of assets at minimum) and ownership of each asset

☐ 9. Copy of estate tax returns

☐ 10. Beneficiary/heirs
   a. Names
   b. Addresses
   c. Social security numbers
   d. Federal tax brackets (if planning needed)

☐ 11. Copy of decedent's checking account ledger for year of death (for use in preparing decedent's final income tax returns)

☐ 12. List of estate accounts opened along with account disbursement ledger.

☐ 13. Copy of any valuations/appraisals done.

☐ 14. Estate planning attorney (who drafted will) name and contact information.

☐ 15. Executor's name and contact information. Executor's social security #.

☐ 16. Consideration of any expenses to be accounted for on Form 706 instead of estate's Form 1041.

☐ 17. Year-end tax documents (1099-INT, 1099-DIV, etc.). If in year of death, need to allocate amounts on these documents to pre-death and post-mortem.