ALFANO & COMPANY LLC
www.alfanocpa.com

2019 Trust and Estate Questionnaire

To help us ensure no income or deductions are missed in your business tax preparation and due to increased scrutiny by the IRS on the procedures of tax preparers we need you to answer the following questions before we can complete your business return

☐Y ☐N ☐N/A Did the fiduciary's name or address change during the year?

If this address change was related to a move to a different state, does this also constitute a change of residency from the trust? Please indicate the date of the address change here: _________________

☐Y ☐N ☐N/A Were there any changes in beneficiaries during the year (name, address, etc.)?

☐Y ☐N ☐N/A Did the beneficiaries/grantors receive distributions (income or other assets)? If so, please provide the breakdown and supporting documents.

☐Y ☐N ☐N/A Is this the first tax year the estate or trust will be filing an income tax return? If so, please provide the start-up documents for the trust/estate.

☐Y ☐N ☐N/A Is this the last tax year the estate or trust will be filing an income tax return?

☐Y ☐N ☐N/A May the IRS discuss this return with the preparer?

☐Y ☐N ☐N/A Did you receive any correspondence from the IRS or other taxing authority during the year?

☐Y ☐N ☐N/A Did the estate or trust receive interest or dividend income or sell/exchange any capital assets (stocks, bonds, homes)?

☐Y ☐N ☐N/A Did the estate or trust have any securities that became worthless? If so, provide the purchase date, cost basis, when it became worthless, and the factors used to determine that it became worthless.

☐Y ☐N ☐N/A Did the estate or trust have any debts cancelled or forgiven? If so, please provide form 1099-C.

☐Y ☐N ☐N/A Have you received all of the expected Schedule K-1s issued to the estate or trust?

☐Y ☐N ☐N/A Did the estate or trust have any foreign income or pay any foreign taxes?

☐Y ☐N ☐N/A Did the estate or trust own or have signature authority over a foreign bank account, trust, pension, or business?

☐Y ☐N ☐N/A Did the estate or trust receive a distribution form, or were you the grantor of, or transferor to, a foreign trust?

☐Y ☐N ☐N/A If you have an overpayment, do you want the excess tax applied to your 2020 estimated tax (instead of being refunded)?

☐Y ☐N ☐N/A Is the information you have provided to us for your tax return complete & accurate to the best of your knowledge?

☐Paper & Portal ☐Portal How would you like a copy of your tax return? **If you select Paper, you will be charged an additional $25 fee.**

Trust/Estate Name: __________________________________ Filled Out by: __________________________________

E-Mail Address: ____

Why you should choose "Portal Only":

Instead of receiving a paper copy of your return (which once reviewed should be securely locked up in a safe or deposit box) you will only receive a copy of your return in our ***secure online portal***. Once your return is prepared and ready for your review you will be notified by e-mail with instructions to set up your personal login. You can review the return and then download and sign any action items necessary to file your return. For the next three years you will then have the ability to download and print the return whenever you may require it (for FAFSA or loan applications, for example). With access to your portal set up you will also be able to SECURELY upload your tax related documents for our team (this is FAR more secure than e-mail!), as well as any other personal information you would like to keep safe (passports, wills, insurance policies, etc.). By selecting Portal only this year you will also avoid a $25 handling fee. Should you have any questions or concerns please e-mail us (reception@alfanocpa.com) or call the office 203-698-7700.