Brangham & Associates, Inc.
Certified Public Accountants
Accounting • Taxes • Consulting • QuickBooks Training and Consulting

ESTATE INFORMATION SHEET

☐ NEW -or- ☐ UPDATE

_____
[Today's Date]

General Estate Info:	**Estate Name** _____ **FEIN** _____ **Address** _____ [Street] [PO Box] _____ [City] [State] [ZIP]
Decedent Information:	**Name:** **SSN:** **Date of Death:**
Responsible Party:	**Name:** _____ **Title:** ☐**Executor/Executrix -or-** ☐**Personal Representative** ☐Y ☐N Did the decedent leave a will? ☐Y ☐N Will the tax refund be paid out according to the laws in the state where the decedent was a legal resident? ☐**Court Appointed Representative** Provide a copy of the certified stamped certificate of court appointment - *required* **Phone #:** _____ **Fax #** _____ **Email:** _____
Estate Filing:	☐Y ☐N **Has or will an Estate tax return – Form 706 – be filed?** Under current law, a federal estate return is required to be filed when the decedent's assets value exceed $11,180,000. However, if you are, or you represent, a surviving spouse, you may wish to elect to file a Form 706 to port the unused portion of the decedent's exemption to the remaining spouse's estate. ☐ I acknowledge that the estate assets are less than $11,180,000 ☐I confirm that I have been advised of the election to file a federal estate return *Choose one*: ☐ I do not wish to file Form 706 ☐I am electing to file Form 706 _____ _____ Responsible Party Signature Date
Attorney:	**Name:** _____ **Phone:** _____ **Email:** _____
Beneficiary Info.	**Beneficiary 1** **Beneficiary 2** **Beneficiary 3** **Name** _____ _____ _____ **Address** _____ _____ _____ **Phone** _____ _____ _____ **SSN** _____ _____ _____
Referred by:	
Special Issues or Concerns:	**OFFICE USE ONLY** **Admin Checklist:** ☐ Create IT Record ☐ Update File Path ☐ Create File Folder ☐ Create Portal ☐ Add to Go Daddy ☐ Assign Service Tasks ☐ To - Onboarding **Client #**