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

TRUST INFORMATION SHEET

☐ NEW -or- ☐ UPDATE

____
[Today's Date]

General Trust Info:	**Trust Name** ______________________ **Address** ______________________ [Street] [PO Box] ______________________ [City] [State] [ZIP] **Phone #** ____________ **Fax #** ____________ **Start Date** ____________ **Email** ____________
Referral:	
Nature of the Trust:	**** Please provide a copy of the Trust Documents.***
FEIN:	
Trustee Name:	
Beneficiary Info.	

	Beneficiary 1	**Beneficiary 2**	**Beneficiary 3**
Name			
Address			
Phone			
SSN			

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 #**