

*Elite* Tax & Financial Services, LLC

1241 S. Main St. Suite 21  
Wake Forest, NC 27587

Tax year \_\_\_\_\_

**ESTATE INFORMATION FORM**

**Estate Information**

Name of the Estate \_\_\_\_\_ EIN # \_\_\_\_\_

Address: \_\_\_\_\_ Date Entity was created \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County \_\_\_\_\_

**Decedent's Estate** Decedent's Social Security \_\_\_\_\_ Date of Death \_\_\_\_\_

Name of Decedent \_\_\_\_\_

Initial Return \_\_\_\_\_ Final Return \_\_\_\_\_ Address Change \_\_\_\_\_ Amended Return \_\_\_\_\_

**Fiduciary Contact Information** Executor \_\_\_\_\_ Executrix \_\_\_\_\_ Other \_\_\_\_\_

Name of Executor/Executrix \_\_\_\_\_ SS# \_\_\_\_\_

Social Security Number \_\_\_\_\_ Phone # \_\_\_\_\_

Email \_\_\_\_\_ Address \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County \_\_\_\_\_

**Beneficiary Information**

1. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

2. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

3. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

4. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

5. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

6. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone # \_\_\_\_\_ Email \_\_\_\_\_

7. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone # \_\_\_\_\_ Email \_\_\_\_\_

8. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone # \_\_\_\_\_ Email \_\_\_\_\_

9. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone # \_\_\_\_\_ Email \_\_\_\_\_

10. Name \_\_\_\_\_ SS# \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone # \_\_\_\_\_ Email \_\_\_\_\_