

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 _____