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Tax Services Onboarding

HOW-TO INFORMATION FOR TRUSTS & ESTATES

Thank you for choosing Storen Financial for your tax planning and preparation needs. Our team of seasoned tax professionals will work with you to utilize tax-saving strategies that are tailored to your unique situation.

In order to make your onboarding experience easier, we've compiled everything you need to get started.

DOCUMENTS NEEDED FOR ONBOARDING:

- Storen Financial New Trust & Estate Data Sheet
- Copy of Prior 2 Years Tax Returns (if applicable)
- Legal Copy of Trust or Will for an Estate
- IRS Confirmation of Tax ID / EIN Letter

DOCUMENTS NEEDED FOR TAX PREPARATION & PLANNING:

- All trust and estate related documents - Copy of check register, income and expense statements, balance sheets and bank statements (if applicable).

FORM NEEDED TO COMPLETE A TAX RETURN:

- Storen Financial Engagement Letter

OPTIONS FOR HOW TO SUBMIT DOCUMENTS:

- Upload to your secure Storen Financial Client Portal (Please contact us to request access.)
- Drop off documents at our office in Zionsville
- Place documents in one of our secure lockboxes (Located in Brownsburg or Zionsville. See instructions on our website.)

For data security purposes, please do NOT email personal or financial information.

OTHER QUESTIONS / RESOURCES

For more information, tools, resources and forms visit our website at **www.storenfinancial.com/tax-season** or contact our team at any time.

Does your investment advisor consider your long-term TAX impact?

Our team of experienced professionals work with you to develop a comprehensive, long-term financial plan that implements customized tax-saving strategies that fit your unique situation.

These strategies not only focus on investments and stock portfolios, but factor in elements such as Medicare, Social Security, legacy planning, and much more.

DID YOU KNOW?

Greg Storen is a long-term member of Ed Slott's Elite IRA Advisor Group, an exclusive organization dedicated to the ongoing study and mastery of constantly changing and complex tax laws impacting your retirement savings.

Ask us how!

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New Trust & Estate Data Sheet

Thank you for choosing Storen Financial for your trust and/or estate tax return preparation. Please complete the form below and note that we may need additional information from you (if applicable) such as: legal trust/estate document, IRS confirmation of tax id, trustee and beneficiary information, grantor information, copy of check register, income and expense statements, balance sheets, bank statements or copy of prior tax returns for the past 2 years.

TRUST/ ESTATE INFORMATION

Legal Trust/ Estate Name:			
Federal ID:			
Date Trust/Estate Created:		Date of Death, if applicable:	
Preferred Contact:		Phone:	
Attorney Name:		Phone:	

TRUST/ ESTATE MAILING ADDRESS

Street	City	State	Zip

TRUSTEE/ EXECUTOR INFORMATION

Trustee/ Executor Name:		Relationship to Grantor:	
SS# or Tax ID#:		Date of Birth:	
Email:		Phone:	
Is the trustee/executor also a beneficiary (yes or no)?			

TRUSTEE/ EXECUTOR MAILING ADDRESS

Please complete if different from the trust mailing address.

Street	City	State	Zip

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New Trust & Estate Data Sheet

TRUSTEE/ ESTATE BENEFICIARIES

Name:		Date of Birth:	
SS# or Tax ID#:		% of Ownership:	
Tax Entity (individual, llc, s corp, trust, other):			

Street	City	State	Zip

Name:		Date of Birth:	
SS# or Tax ID#:		% of Ownership:	
Tax Entity (individual, llc, s corp, trust, other):			

Street	City	State	Zip

Name:		Date of Birth:	
SS# or Tax ID#:		% of Ownership:	
Tax Entity (individual, llc, s corp, trust, other):			

Street	City	State	Zip

Name:		Date of Birth:	
SS# or Tax ID#:		% of Ownership:	
Tax Entity (individual, llc, s corp, trust, other):			

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