**Information Needed to Prepare a 2015 Form 1041 Fiduciary Income Tax Return for an Estate or Trust**

If you are probating an estate for a decedent that passed away in 2014 which generates more than $600 of income including stock or real property proceeds, you have to file a fiduciary income tax return using form 1041 for 2015. Remember to file a final 1040 for the decedent in the year he passed away. If you want our firm to prepare the 1041 we need the following information:

1. The Estate or Trust Taxpayer Identification Number (TIN). If you do not have this and would like our firm to get it for you, we will need the Executor’s name address and social security number;

2. Death Certificate of the Decedent;

3. Short Certificate or Letters Testamentary Appointing the Executor;

4. Names, addresses and social security numbers of all beneficiaries;

5. Copy of REV-1500 PA inheritance Tax Return Schedule H estate expenses including attorney and accounting fees, probate fees, fiduciary fees and real estate taxes paid on estate property;

6. HUD-1 Settlement sheet for all estate real property sold in 2015;

7. Expenses incurred to fix up the property that was sold in 2015, including repairs and utility bills;

8. All income information including but not limited to stock and bond sales reported on 1099-B, dividend reported on 1099-DIV, interest income reported on 1099-INT.

If you have any questions feel free to contact Gregory J. Spadea at Spadea & Associates, LLC in Ridley Park, Pennsylvania at 610-521-0604.