

Fiduciary Services Engagement Questionnaire

Gautam CPAs

Client Information

Full Name:

Date of Birth:

Address:

Phone:

Email:

Estate & Trust Information

I have a will

I have an existing trust

Type of trust:

Current trustee/executor:

Successor trustee:

Interested in appointing Gautam CPAs as Trustee

Interested in appointing Gautam CPAs as Co-Trustee

Assets Overview

Cash / Bank:

Real Estate:

Investments:

Business Interests:

Estimated Net Assets:

Tax Services

Fiduciary tax return (Form 1041)

Trust accounting

Estate tax (Form 706)

Tax planning

Client Signature:

Date: