Steadman Tax Service, LLC



Trust Tax Organizer	Tax Year	(if fiscal year	r, provide date	es)
Trust: EIN		Name of Trust		
Address: Mailing Addre	ess	City	State	Zip Code
Is the Trust State of residence the sam	e as the mailing addre	ess? Yes or N	o Other S	tate
Date Trust was created:	Type of Trust: Sim	ple \Box Complex	□ Grantor	\Box Other \Box
Trustee contact name:		Email:		
Trustee Phone:		(Home o	r Mobile)	
Mailing Address (if different)		City	State Zip	Code

The purpose of this organizer is to assist you in gathering the necessary documents to prepare your Trust tax return. If the Trust was created from a Will, please provide a copy of the decedent's Will.

- □ Copy of the Trust documents (and Will if applicable)
- □ Copy of Prior Trust Return (Form 1041)
- $\hfill\square$ Accounting records including all income and expenses for the Trust for the year
- □ Any sale documents for investments, real estate or other property sold during the year
- □ Itemized list of all property owned by the Trust, including investments, real property, oil & gas interests, or any other assets

Did the Trust have any transactions involving crypto currencies, such as Bitcoin, Etherium, etc? (Receive, gift, purchase, sell or other transactions)	Yes	No
Does the Trust have any foreign accounts (bank or other financial interest)	Yes	No
Does the Trust own any assets outside the United States? If yes, provide details.	Yes	No

Beneficiary First and	Social Security	ormation for all beneficiaries; attac Beneficiary's mailing	Beneficiary's	Distributions to
Last Name	Number	address	percentage	Beneficiary
		Street Address	share of	during tax yea
		City, State, Zip	Trust	a annig taxt you
			11000	

questions you may have.Types of income: Did the trust receive any income from the followingW2 wages (applicable if received from decedent)Pension, retirement, or annuity incomeRoyalty income	
W2 wages (applicable if received from decedent) Pension, retirement, or annuity income	
Pension, retirement, or annuity income	
Royalty income	
Rental income (please complete the rental worksheet on our website)	
Insurance proceeds	
Interest income	
Dividend income	
Any other investment income (eg sale of stocks, or other property)	
K1s issued to the trust (as a shareholder or partner)	
Income from an installment sale. If yes, provide details	
Any income from Crypto currencies (Bitcoin, Etherium, etc)	
Any other types of income not listed. Please explain	
Estimated tax payments for the year: (provide copies of all payments)	

Income Worksheet

Please list the income received and attach copies of all tax documents, including 1099s, K1s or other statements received for the year.

Income Source Name of bank or other payer	Income Received	Reported on tax form?	Any direct expenses related to receiving this income? If yes, provide details on supplement page.
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		

Expense Worksheet Please provide the following information relating to expenses paid by the trust.

Trustee fees	\$ Accounting / Tax Prep	\$
Attorney fees	\$ Other	\$
Other	\$ Other	\$

Supplemental information Please provide any additional information or explanation details.

Taxpayer certification		
I hereby certify that I have truthful	ully and accurately, to the best of my kno	wledge and ability,
	s, LLC with all information requested on	
that I have answered fully and tru	uthfully to all questions and requests for	information.
Authorized Signature	Print	Date