



287 Century Circle, Ste. 200  
Louisville, Colorado 80027  
303-449-7445  
www.TandemCPAs.com

Date: \_\_\_\_\_

Trust or Estate Legal Name (as it appears on IRS EIN letter):  
\_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Primary Trustee or Personal Representative: \_\_\_\_\_

Title: \_\_\_\_\_

Phone (preferred): \_\_\_\_\_ (circle: Business/ Cell/ Other)

Other Phone: \_\_\_\_\_ (circle: Business/ Cell/ Other)

E-Mail: \_\_\_\_\_

Co-Trustee: \_\_\_\_\_

Title: \_\_\_\_\_

Phone (preferred): \_\_\_\_\_ (circle: Business/ Cell/ Other)

Other Phone: \_\_\_\_\_ (circle: Business/ Cell/ Other)

E-Mail: \_\_\_\_\_

Trust or Estate EIN: \_\_\_\_\_

Completed Tax Return Delivery (please circle): Paper Online Portal Flash Drive

Preferred Contact Method (please circle): E-mail Phone

Whom may we thank for referring you? \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_