



Peritum LLC

TAX | SUPPORT | CONSULTING

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## Trust/Estate Intake Sheet

### ENTITY INFORMATION

Entity Name: \_\_\_\_\_

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

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

FEIN: \_\_\_\_\_ Date Created: \_\_\_\_\_

### TRUSTEE/EXECUTOR INFORMATION

Full Legal Name \_\_\_\_\_

Address \_\_\_\_\_

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

Date of Birth \_\_\_\_\_ SS# \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

### BENEFICIARY #1

Full Legal Name \_\_\_\_\_

Address \_\_\_\_\_

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

Date of Birth \_\_\_\_\_ SS# \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

**BENEFICIARY #2**

Full Legal Name _____		
Address _____		
City _____	State _____	Zip _____
Date of Birth _____	SS# _____	
Phone _____	E-mail _____	

**BENEFICIARY #3**

Full Legal Name _____		
Address _____		
City _____	State _____	Zip _____
Date of Birth _____	SS# _____	
Phone _____	E-mail _____	

**BENEFICIARY #4**

Full Legal Name _____		
Address _____		
City _____	State _____	Zip _____
Date of Birth _____	SS# _____	
Phone _____	E-mail _____	

**DECEDENT INFORMATION (when applicable)**

Full Legal Name _____	
Date of Birth _____	SS# _____
Date of Death _____	