



## 1041 Client Information

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Client ID: \_\_\_\_\_

Entity Type: \_\_\_\_\_

Trust/Estate Name: \_\_\_\_\_

EIN: \_\_\_\_\_

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

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

\_\_\_\_\_

Phone Number: \_\_\_\_\_

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

Fiduciary/Trustee Name: \_\_\_\_\_

SSN: \_\_\_\_\_

Nickname: \_\_\_\_\_ (if go by name other than legal name)

Date of Birth: \_\_\_\_\_

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

\_\_\_\_\_

Phone Number: \_\_\_\_\_

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

Beneficiary Name: \_\_\_\_\_

SSN: \_\_\_\_\_

Nickname: \_\_\_\_\_ (if go by name other than legal name)

Date of Birth: \_\_\_\_\_

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

\_\_\_\_\_

Phone Number: \_\_\_\_\_

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

Beneficiary Ownership %: \_\_\_\_\_

Beneficiary Name: \_\_\_\_\_

SSN: \_\_\_\_\_

Nickname: \_\_\_\_\_ (if go by name other than legal name)

Date of Birth: \_\_\_\_\_

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

\_\_\_\_\_

Phone Number: \_\_\_\_\_

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

Beneficiary Ownership %: \_\_\_\_\_

More beneficiaries? Please request another page.