

**IMPORTANT TAX INFORMATION**  
**FIDUCIARY INCOME TAX INFORMATION**

**What is it?**

Income tax returns for estates/trust (Form 1041)

**Who needs to file?**

Generally, if the trust or estate's total income for the year exceeds certain thresholds, then it is required to file a federal tax return. We are happy to assist in determining if your trust or estate is required to file this year.

**Information needed for ACPA to assist in filing:**

- Bank statements for the year ended 12/31
- Investment account statements for the year ended 12/31
- Any distributions made (including Name, Address, SSN of who distributions were made to)