

# Request of Information

Dear Beneficiary:

You have been designated to receive assets from an Estate or Trust that is using our services to prepare the 1041 US Income Tax Return for Estates and Trusts. The 1041 Tax Return is used to report income, losses, and deductions the estate/trust incurs from the date of death until the date the Estate/Trust closes. Please note that this is not a Form 706 US Estate Tax Return; which is only based on the value of the decedent's assets.

Generally, as a beneficiary, you will only pay tax on the earnings that the assets make while in the Estate/Trust's care or on any accounts that were previously untaxed to the decedent such as IRA, 401k, and Annuity accounts. You might also have losses or deductions based on this particular Estate/Trust that can be passed through to you to include on your individual income tax return.

IRS requires the Estate/Trust to issue a Form K-1 to all beneficiaries in a year where there is either income or losses that flow through to the beneficiaries. It is very important that you wait to file your personal income tax return until you receive your K-1. This K-1 will be provided to you based on the option you choose in Part 2. It is also provided to the Internal Revenue Service.

In order to prepare the Form K-1 timely, please fill out Parts 1 and 2 of this letter. You can return this form either through the Personal Representative/Trustee of the Estate/Trust or to our firm directly. To return directly to Penrod you can either mail, fax, or upload through our encrypted website portal.

By Mail:  
Penrod Tax Service, Inc.  
16397 State Road 23  
South Bend, IN 46635-1457

By Fax:  
Penrod Tax Service, Inc.  
ATTN: Estates and Trusts  
574-272-1411

By Upload:  
[www.penrodtax.com/estates-trusts](http://www.penrodtax.com/estates-trusts)  
For help uploading documents  
Call 574-272-1400

## Part 1. Beneficiary Information

Name (as shown on your income tax return):

Address:

City: State: Zip Code:

Taxpayer Identification Number

Individuals enter Social Security Number

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Charities enter Employer Identification Number

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## Part 2. K-1 Delivery Method

Please mail my Form K-1 to the above address

Please email my Form K-1 to:

Please note that many times Estates have a different year-end than December 31. If you haven't received a K-1 and you're ready to file your personal income tax return, please contact the personal representative to see if a K-1 will be issued for this tax year.

Signature

Date