INTEGRATED
TAX SERVICES

Working Together:
Our Estate & Trust Tax Process

We make estate and trust tax filing straightforward.
Here's our step-by-step process so you always know what's next.

1 Welcome and Set-Up

We will ask for some basic information to understand your estate and trust needs, the deadlines we're up against, and key players involved (estate attorney, financial planner, etc.)

2 Meeting

You'll meet with one of our tax preparers to review your situation and what's needed. Bringing these documents can be helpful to best understand your situation.

- Death Certificate
- Will and/or Trust Documents
- Inventory of Assets
- Letters Testamentary/Letters of Administration

3 Document Gathering

After your meeting, we'll provide you with a full list of additional documents to gather specific to your situation so we can prepare your returns. This may include:

- Tax documents to complete personal income tax returns
- Items establishing value of assets
- Financial statements establishing income since date of death

4 Preparation & Review

During the return preparation process, we'll ask you for clarifying information and coordinate with your attorney or financial advisor/planner, as needed.

5 Filing & Delivery

We deliver a finalized return for your review and signature, then file on your behalf. Please sign your returns, pay any applicable taxes, and distribute schedule. Schedule K-1s to the beneficiaries.

360-695-1120 its-taxes.com