INTEGRATED
TAX SERVICES

Your Estate & Trust Tax Partner

Coordinated estate, trust, and personal tax preparation for individuals, families, and professional advisors.

www.its-taxes.com connect@its-taxes.com

Clarity and Coordination—When It Matters

Estate and trust tax responsibilities often come during periods of transition—after a loss, a change in health, or while planning ahead. We help you navigate them with clarity and confidence.

Who We Serve

We work with:

- Beneficiaries
- Executors and personal representatives
- Trustees, successor trustees, and POAs
- Financial advisors, attorneys and fiduciaries

We provide coordinated support that ensures nothing falls through the cracks.

How We Help

In preparing and filing your tax returns, we bring clarity where things feel uncertain and structure when they might feel overwhelming.

We help you:

- Know what filings are required—and when
- Feel confident every detail is handled correctly
- Understand your role and responsibilities
- Meet your tax filing responsibilities by preparing your tax returns

After a Loss

A surviving spouse is responsible for final personal tax filings and sometimes an estate return—but may not be sure what's required or when. We help you coordinate so nothing is missed during an already difficult time.

Key Estate & Trust Tax Services

Estate & Trust Tax Preparation

- Estate tax returns
- Final individual returns
- Trust tax returns and K-1s
- Distribution and reporting guidance

Advisor, Attorney & Fiduciary Coordination

- Collaboration with other professionals
- Multi-entity tax alignment
- Ongoing support

Tax Strategy & Planning

- Distribution strategies
- Estate planning considerations
- Charitable and gift planning

Tax Returns We Prepare

We prepare your estate and trust tax returns with accuracy and care, including:

- **Form 706:** Estate Tax Return
- **Form 709:** Gift Tax Return
- **Form 1040:** Final Personal Tax Return
- **Form 1041:** For Estates & Trusts
- **Form 5227:** Split Interest Trust Information Return (Charitable Remainder Trust)

What You Can Expect

When we work together, our goal is to make estate and trust tax filing straightforward for you. Count on us to:

- Understand your situation
- Coordinate across filings
- Prepare, file, and advise

All with full context—so nothing is missed.

First-time Executor

Have you been named executor for an estate and aren't clear about your tax responsibilities? We help identify required filings and prepare the necessary tax returns to help you move forward with confidence.

Work With Our Estate & Trust Tax Experts

Whether you're managing an estate, administering a trust, or supporting clients as an advisor—we're here to help you move forward with clarity and confidence.

Seamless Collaboration with Other Advisors

We work with your financial advisor, attorney and/or fiduciary to ensure:

- Tax filings align with estate and trust documents and legal strategy
- Financial plans and tax decisions work together
- Everyone is operating from the same information

About Us

Integrated Tax Services serves individuals, families and professional advisors in Southwest Washington, the Portland metro area, and beyond. We specialize in tax preparation and planning for estates and trusts, and their associated personal returns. Our team of CPAs, Enrolled Agents, and Client Service Specialists combines technical expertise with genuine care to help clients navigate complex tax and accounting matters.

Ongoing Trust Administration

As a trustee, you need annual filings and beneficiary reporting. We prepare Form 1041, K-1s, and coordination with personal returns to keep everything aligned.

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Start a Conversation With Us

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