

Client interview checklist for a trust or estate's IRS Employer Identification Number (EIN)

Instructions

To quickly obtain a federal tax ID (EIN) for a trust or estate, fill in this 5-minute PDF form, then submit it to Lawyer's Aid Service by email or fax. Lawyer's Aid screens your submitted information, deals with the IRS to obtain the EIN on the trust or estate's behalf, and reports the EIN to you immediately, usually the same or next day. You receive the SS-4 form by mail for your records. For two related EINs, simply fill out two checklists.

For many of the questions, handy tooltips appear when your mouse hovers over them.

A. Checklist for IRS Employer Identification Number (EIN)

1. Entity type: Estate All answers are required.
 Trust*
 *Type of trust: Revocable Irrevocable other: _____

2. Mailing address: _____

3. Estate was probated/Trust was funded on _____ (mm/dd/yyyy)
 in _____ (county & state)

4. Business phone number: _____

5. Names and SSNs:

Trusts only:	<i>enter full names as they appear in Social Security records</i>
Name of trust:	_____
Trustee:	_____
Grantor:	_____ SSN: _____
Estates only:	
Decedent:	_____ SSN: _____
Executor:	_____ SSN: _____
Title:	<input type="checkbox"/> Executor <input type="checkbox"/> Executrix <input type="checkbox"/> Administrator <input type="checkbox"/> Personal Representative

6. Fill in this box only if there will be employees in the next 12 months:

Highest number of employees expected in next 12 months:		
Agricultural: _____	Household: _____	Other: _____
Earliest date wages may be paid: _____		
Do you expect to pay \$5,000 or less in wages next calendar year (Jan. – Dec.)? <input type="checkbox"/> Yes <input type="checkbox"/> No		

7. Closing month of accounting year: December (recommended) other: _____

8. A Lawyer's Aid Service representative is authorized as third-party designee to obtain the EIN.

9. Notify me of EIN by: fax phone email (Original is mailed with bill.)

Fax, phone, or email address: _____

B. Order form, prices, and contact info

Prices may change without notice.

1. Tell us about your order:

EIN for an estate or trust \$50

2. Submit to Lawyer’s Aid Service:

Email to maindesk@LawyersAidService.com

Print and fax to
(888) 474-4218

Call (888) 474-2112
to place your order

3. Submit simultaneous payment:

By credit card via online portal:
www.LawyersAidService.com/Payment

Or mail to:
Lawyer’s Aid Service
PO Box 848
Austin, Texas 78767-0848

Attorney’s name: _____ Phone: _____

Contact name: _____ Phone: _____

Firm name: _____ Fax: _____

Street address: _____

City: _____ State: _____ Zip: _____ Country: _____

Email: _____ Type or sign your name below to confirm you are sending simultaneous payment (required)

Your further instructions, if any: