

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 [five](#)-minute PDF form, then submit it to Lawyer's Aid Service by email or fax.

Lawyer's Aid screens the form for you, 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 boxes, handy tips appear when your mouse hovers [over the selection](#).

A. Checklist for IRS Employer Identification Number (EIN)

1. Entity type: Estate
 Trust*

All answers are required.

*Type of trust: Revocable Irrevocable other: _____

2. a. Street address of entity: _____ b. Mailing address, if different: _____

3. Date trust was funded or estate was created/funded/probated: _____

4. Names and SSNs:

<p>Trusts only: Name of trust: _____ Trustee's name: _____ Grantor's name as in Social Security records: _____ Social Security number: _____</p> <p>Estates only: Decedent's name as in Social Security records: _____ Social Security number: _____ Executor's name as in Social Security records: _____ Social Security number: _____ Title: <input type="checkbox"/> Executor <input type="checkbox"/> Executrix <input type="checkbox"/> Administrator <input type="checkbox"/> Personal Representative</p>
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5. Closing month of accounting year: December (recommended) other: _____

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

<p>Highest number of employees expected in next 12 months: Agricultural: _____ Household: _____ Other: _____ Earliest date wages may be paid: _____ Do you expect to pay \$4,000 or less in wages next calendar year (Jan. – Dec.)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>

7. Phone number for the trust or estate: _____

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 may change without notice.

1. Tell us about your order:

One EIN (completed same or next day) **\$50**

Two related EINs (completed same or next day) **\$65**

The related EIN order has been recently submitted, OR is submitted with this order.

2. Please pay [here](#), or mail your \$50 or \$65 check simultaneously to:

Lawyer's Aid Service, PO Box 848, Austin, Texas 78767-0848

Let this checklist serve as your invoice.

3. Your information:

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)

4. Submit to Lawyer's Aid Service your way:

Email to maindesk@
LawyersAidService.com

Print and fax to
(888) 474-4218

Call (888) 474-2112
to place your order

Your further instructions, if any: