



Preparing the Income Tax Return of the Estate (Form 1041)

- Besides the Estate tax return, an income tax return may be required for the Estate.
- This return captures the income and expenses of the Estate after death up until all assets have been distributed and the Estate is closed.
- The information required will be 1099's for interest, dividends, capital gains, rental income, expenses, if any, IRA distributions and all other income from the Estate assets.
- All expenses related to the administration of the Estate and the maintenance of the assets of the Estate must also be provided.

If you have any questions, please contact: **Kenneth G. Hydock, Esq., CPA, PFS, AEP**
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