

Life's Plan Individual Trust Sheet

Name of Trust: _____

EIN: _____

Date entity created: _____

Type of Entity (circle one): Grantor Simple Complex Estate

Beneficiary Information

Name: _____

Social Security Number: _____

Date of Birth: _____

Address to send K-1/Letter: _____

Is there a 1040 needed? Yes No

Please provide the following documents if you have them:

Form SS-4

Prior year tax return