

[Date]

[Trustee/Executor Name]

[Address]

[City, State, Zip Code]

Re: [Name of Estate or Trust]

Dear [Name of Trustee or Executor],

This letter is to advise you regarding the requirements for filing the fiduciary income tax returns for the above-referenced entity for the tax year ending [Year].

As the fiduciary, you are responsible for ensuring the timely filing of Federal Form 1041 (U.S. Income Tax Return for Estates and Trusts) and any applicable state income tax returns. Please note the following key deadlines and requirements:

- **Filing Deadline:** The returns must be filed by [Insert Date, e.g., April 15th].
- **Extension:** If an extension is required, a request must be filed by the original due date to avoid late-filing penalties.
- **K-1 Distribution:** Schedule K-1 forms must be provided to all beneficiaries to report their share of the entity's income, deductions, and credits.

To facilitate the preparation of these returns, please provide the following documentation by [Insert Deadline Date]:

- Year-end brokerage statements and 1099s.
- Records of any distributions made to beneficiaries during the tax year.
- Invoices for deductible administrative expenses (legal, accounting, or trustee fees).
- A summary of any capital gains or losses realized.

Failure to file these returns or pay any tax due by the deadline may result in interest and penalties imposed by the taxing authorities.

Please contact our office at [Phone Number] or [Email Address] if you have any questions or would like to schedule a meeting to review the necessary documentation.

Sincerely,

[Your Name]

[Your Title]

[Company Name]