

Fiduciary Income Tax E-File Authorization Form

Directions: This form is to be completed, signed by the fiduciary, and retained by the transmitter/preparer. Do not mail this form to the tax agency unless requested to do so.

Tax Year

For Tax Year (YYYY):

Part I: Estate or Trust Information

Name of Estate or Trust:

Employer Identification Number (EIN):

Name of Fiduciary:

Title of Fiduciary:

Address (Number and Street):

City: State: ZIP Code:

Part II: Tax Return Information (Whole Dollars Only)

1. Total Income:

2. Taxable Income:

3. Total Tax:

4. Tax Due (or Amount Owed):

5. Overpayment / Refund Amount:

Part III: Declaration of Fiduciary

I authorize the transmitter to e-file this return on behalf of the estate or trust. I certify that the information provided on this form and the electronic return is true, correct, and complete.

Signature of Fiduciary (Print name for digital authorization):

Date Signed (MM/DD/YYYY):

Part IV: Declaration of Electronic Return Originator (ERO) or Paid Preparer

I declare that I have reviewed the above fiduciary's return and that the entries on this form are accurate to the best of my knowledge.

Paid Preparer/ERO Name:

Preparer PTIN:

Firm Name (or yours if self-employed):

Firm EIN:

Preparer Signature:

Date Signed (MM/DD/YYYY):

