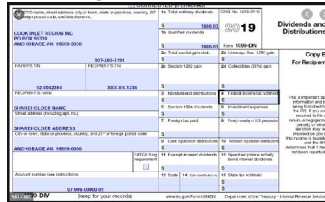


DOCUMENTS TO BRING TO ACCOUNTANT - DUTIES OF THE EXECUTOR

- Tax statements (w-2, 1099 forms, settlement statements, social security statement, and such)

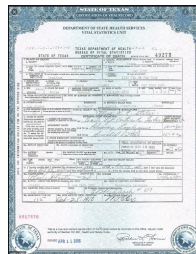


A screenshot of a 1099-DIV form from the IRS. The form is titled "1099-DIV" and "Dividends and Distributions". It includes fields for the recipient's name and address, the payer's name and address, and various boxes for reporting dividend income, capital gains, and other distributions. The form is dated for the year 2019.

- Address to be used on final personal tax return or estate tax return
- Copy of the will



- Death certificate



- Personal representative letters
- List of beneficiaries names, addresses and social security numbers
- Checkbook register and/or bank statement for the estate & decedent's account (accounting for the estate)

