ULTIMATE ESTATE PLANNER
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ESTATE ADMINISTRATION PROCESS
FILING FOR AN EMPLOYER IDENTIFICATION NUMBER ("EIN")

In Single or Second-to-Die (Surviving Spouse) Estate Administration matters, an Employer Identification Number ("EIN") is required for the Trust and in order for your firm to properly prepare the necessary Trust Certifications for the client.

Upon engagement at the Initial Estate Administration Meeting with our law firm, while the client is still meeting with the attorney, the administrative assistants are filing to get an EIN for the trust and to finalize the Trust Certifications for the clients to receive before they leave.

REQUIREMENTS:

- Clients to sign IRS Form SS-4 to designate the law firm as an authorized third party designee to complete an online application
- The decedent's death certificate

CLICK HERE FOR IRS EIN ASSISTANT

Once an EIN is obtained (immediately), the Trust Certification can be completed and provided to the clients.