



## Entity Profile

*Information in this Profile can be applied to forms. Save and close the Profile before applying.*

Legal Name \_\_\_\_\_

Address 1 \_\_\_\_\_

Address 2 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_ Zip Code \_\_\_\_\_

Phone Number ..... \_\_\_\_\_

FEIN ..... \_\_\_\_\_

Date Business Started/Incorporated .. \_\_\_\_\_

State of Organization/Incorporation . . . \_\_\_\_\_

NAICS Business Code Number ..... \_\_\_\_\_

Principal Business Activity ..... \_\_\_\_\_

Contact Name and Title ..... \_\_\_\_\_

Phone ..... \_\_\_\_\_

### Fiduciary

Name of Estate or Trust \_\_\_\_\_

Decedent's SSN \_\_\_\_\_

Date Entity Created (Date of Decedent's Death or Date Trust Established) \_\_\_\_\_