

800-716-2558

December 12, 2023

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

Re: JACK AND SUZAN ANDERSON TRUST

JACK ANDERSON:

We have prepared and enclosed your 2023 Trust Income Tax returns for the year ended December 31, 2023.

This return has qualified for electronic filing and the PIN program has been elected. After you have reviewed the return for completeness and accuracy, please sign and return Form 8879-F to our office. The return will be transmitted electronically to the IRS, and no further action is required.

Your check for \$11535, payable to the United States Treasury, must be paid by April 15, 2024. Be sure to include your payment with Form 1041-V, Form 1041 Payment Voucher. Include the name, address, and telephone number of the fiduciary, Employer ID Number, and the words "2023 Form 1041" on your check.

Department of the Treasury  
Internal Revenue Service Center  
Ogden, UT 84201-0148

Your income tax return includes a penalty for underpayment of estimated tax from Form 2210 of \$509.

The federal estimated income tax due dates and required payments are as follows:

Installment No. 1 by 04/15/24 .....\$5149

Installment No. 2 by 06/17/24 .....\$5149

Installment No. 3 by 09/16/24 .....\$5149

Installment No. 4 by 01/15/25 .....\$5149

Separately mail the federal estimated payment vouchers to:

Internal Revenue Service Center  
P.O. Box 932400  
Louisville, KY 40293-2400

Enclose, but do not attach, your check or money order, payable to "United States Treasury". Include the Employer ID Number and the words "2024 Form 1041-ES" on the payment.

Attached are Schedules K-1 for each beneficiary indicating their share of income, deductions and credits to be reported on their respective tax returns. These schedules should be immediately forwarded to each of them.

800-716-2558

December 12, 2023

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

Re: JACK AND SUZAN ANDERSON TRUST

JACK ANDERSON:

Enclosed is your 2023 Form(s) 114, Report of Foreign Bank and Financial Accounts.

REPORT OF FOREIGN BANK AND FINANCIAL ACCOUNTS:

Form 114 has been prepared for electronic filing. Please sign, date and return Form 114A to our office. We will then transmit your report to the FinCEN.

A copy of the form is enclosed for your files. We suggest that you retain this copy indefinitely.

Very truly yours,

Caroline Lynn

800-716-2558

December 12, 2023

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

Re: JACK AND SUZAN ANDERSON TRUST

JACK ANDERSON:

We have prepared and enclosed your Maryland Fiduciary Income Tax return for the year ended December 31, 2023.

The Maryland Form 504 return has qualified for electronic filing. After you have reviewed your return for completeness and accuracy, please sign, date and return MD EL101B to our office. We will then transmit your return electronically to the MDDOR, and no further action is required. Do not mail the paper copy of the return to the MDDOR.

Enclose a check or money order for \$32253, payable to Comptroller of Maryland. Separately mail Form EL 102B with payment on or before April 15, 2024 to:

Comptroller of Maryland  
Revenue Administration Division  
PO Box 2601  
Annapolis, MD 21404-2601

The Maryland estimated income tax due dates and required payments are as follows:

Installment No. 1 by 04/15/24 .....\$8870  
Installment No. 2 by 06/17/24 .....\$8870  
Installment No. 3 by 09/16/24 .....\$8870  
Installment No. 4 by 01/15/25 .....\$8870

Separately mail the state estimated tax payment vouchers to:

Comptroller of Maryland  
Revenue Administration Division  
110 Carroll Street  
Annapolis, MD 21411-0001

Enclose your check or money order, payable to "Comptroller of Maryland".

Write the employer identification number of the estate or trust and the words "2024 " on your check.

Attached are Schedules K-1 for each beneficiary indicating their share of income, deductions and credits to be reported on their respective tax returns. These schedules should be immediately forwarded to each of them.

800-716-2558

December 12, 2023

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

Re: JACK AND SUZAN ANDERSON TRUST

JACK ANDERSON:

Enclosed are your 2023 Trust Income Tax returns, as follows...

2023 U.S. Income Tax Return For Estates and Trusts

2024 U.S. Estate and Trust Income Tax Estimates

2023 Maryland Fiduciary Income Tax Return

2024 Maryland Fiduciary Income Tax Estimates

Form 114, Report of Foreign Bank and Financial Accounts.

Each original should be dated, signed and filed in accordance with the filing instructions. The copy should be retained for your records.

Very truly yours,

Caroline Lynn

# 2023 TAX RETURN FILING INSTRUCTIONS

U.S. INCOME TAX RETURN FOR ESTATES AND TRUSTS

JACK AND SUZAN ANDERSON TRUST

**FOR THE YEAR ENDING**

December 31, 2023

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**Prepared For:**

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

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**Prepared By:**

HATFIELD & ASSOCIATES  
8186 JACKSON RD., SUITE 100  
ANN ARBOR, MI 48103

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**To Be Signed and Dated By:**

The fiduciary

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**Amount of Tax:**

Total tax	\$	95697
Less: payments and credits	\$	84671
Plus: interest and penalties	\$	509
Balance due	\$	11535

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**Overpayment:**

Credited to your estimated tax	\$	0
Refunded to you	\$	0

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**Mail Tax Return To:**

This return has qualified for electronic filing and the PIN program has been elected. After you have reviewed the return for accuracy, please return Form 8879-F to our office. The return will be transmitted electronically to the IRS.

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**Forms to be Distributed to Beneficiaries:**

Enclosed are copies of Schedule K-1 to be distributed to the beneficiaries.

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**Return Must be Mailed On or Before:**

Not applicable

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**Special Instructions:**

Your check for \$11535, payable to the United States Treasury, must be paid by April 15, 2024. Be sure to include your payment with Form 1041-V, Form 1041 Payment Voucher. Include the name, address, and telephone number of the fiduciary, Employer ID Number, and the words "2023 Form 1041" on your check.

Department of the Treasury  
Internal Revenue Service Center  
Ogden, UT 84201-0148

# 2024 ESTIMATED TAX FILING INSTRUCTIONS

U.S. ESTATE AND TRUST ESTIMATED INCOME TAX

JACK AND SUZAN ANDERSON TRUST

**FOR THE YEAR ENDING**

December 31, 2024

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**Prepared For:**

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

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**Prepared By:**

HATFIELD & ASSOCIATES  
8186 JACKSON RD., SUITE 100  
ANN ARBOR, MI 48103

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**Amount of Tax:**

Total Estimated Tax	\$	20596
Less credit from prior year	\$	0
Less amount paid on 2024 estimate	\$	0
Balance due	\$	20596

Payable in full or in installments as follows:

Voucher	Amount	Due Date
No. 1	\$ 5149	April 15, 2024
No. 2	\$ 5149	June 17, 2024
No. 3	\$ 5149	September 16, 2024
No. 4	\$ 5149	January 15, 2025

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**Make Check Payable To:**

United States Treasury

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**Mail Voucher and Check (if applicable) To:**

Internal Revenue Service Center  
P.O. Box 932400  
Louisville, KY 40293-2400

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**Special Instructions:**

Include the Employer ID number and the words "2024 Form 1041-ES" on your check.

**TAX RETURN FILING INSTRUCTIONS**  
REPORT OF FOREIGN BANK AND FINANCIAL ACCOUNTS

**FOR THE YEAR ENDING**  
December 31, 2023

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**Prepared For:**

JACK ANDERSON  
1234 MAIN STREET  
BEACH CANDY, CA 92660

---

**Prepared By:**

HATFIELD & ASSOCIATES  
8186 JACKSON RD., SUITE 100  
ANN ARBOR, MI 48103

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**Form must be filed on or before:**

Not applicable

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**Special Instructions:**

Form 114 has been prepared for electronic filing. Please sign, date, and return Form 114A to our office. We will then transmit your report to the FinCEN.