LET'S GET STARTED!

The first thing we need for you to do is to email us (service@tedec.com) or call us at 716-938-9137.

We will ask for a sample of the documents with which we would be working. An estimate of the cost and time involved will be supplied to you and an Engagement Letter will be sent for your signature. With the return of your signed Engagement Letter and retainer check, we will begin your accounting.

Below is a listing of the documents we need to begin a new service project. Copies of these documents can be sent to us via e-mail, online portal, carrier, or the postal service, but please do not send us original documents.

- Will and/or Trust Agreement;
- Death Certificate;
- Tax ID # for entity;
- Dates of Letters Testamentary;
- Executor's/Trustee's name(s), address and social security number;
- Listing of Beneficiaries with addresses and social security numbers;
- Listing of all assets with date of death or date of transfer values (also real property appraisals and tangible personal property appraisals.) This includes both fiduciary carry value and tax basis for each asset;
- Copies of all bank and brokerage account statements from date of death/date of transfer/open to close/present;
- Check register or ledger for the decedent and estate/trust checking accounts, including detail for all deposits and payments;
- Copies of the IRS Fm-706 and/or Fm-1041 which has been filed

As we proceed, we will keep in constant contact with you through emails to keep you updated on our progress, and you will receive monthly invoices. As time goes on, if we determine that our services will exceed the estimate we provided, you will receive notification of the reason and new projected cost.