

Taxpayer Identification Numbers for Estate and Trust Financial Accounts

When you apply to open an account for an estate or a trust at any financial institute, you will be asked for the taxpayer identification number.

The IRS issues taxpayer identification numbers. You must complete an SS-4 form. To obtain a taxpayer identification number, the preferred method of the IRS is as follows:

Go to www.irs.gov/businesses

Click on the link titled 'Employer Identification Number'

Click on "Apply for an EIN Online"

Scroll down to click on line titled 'Apply Online Now'

Click on 'Begin Application'

Choose Estate or Trust (whichever applies to your administration)

Click 'Continue' – follow all instructions and complete all requested information. The IRS will provide an EIN number and confirmation page to print for your records.

Or, to apply by phone: Call 1-800-829-4933. An assistor takes the information, assigns the EIN and provides the number to an authorized individual over the phone.

Questions? Contact:

State taxes: Virginia Department of Taxation www.tax.va.gov - 804-367-8031

Federal taxes: Internal Revenue Services www.irs.gov -800-829-3676