

Welcome to the IRS

Trust and Estate Form 1041 Income

Tax Return

Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to the 2022 Form 1041 income tax return. At any time, you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

If you need assistance completing this survey, please email us at raas.irs.taxpayer.surveys@irs.gov or call 202-803-9147. You can find a Frequently Asked Questions (FAQ) document and copy of the full survey in links below. These links will be available throughout the survey.

Privacy Act and Paperwork Reduction Act Notice for the Taxpayer Burden Survey Data Collections

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfill the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 10 to 15 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all

or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Tax Preparation Methods and Activities

Please answer all questions with reference to the 2022 Form 1041 income tax return for **#{e://Field/NAME}**.

Did you prepare the 2022 Form 1041 income tax return?

0 Yes

Q No

Who prepared the 2022 Form 1041 income tax return?

Select all that apply

D Accountant

D Bookkeeper

D Certified Public Accountant

D Bank

D Attorney

D Enrolled Agent

D Other

Did you use a paid or unpaid third-party professional to perform other activities related to this Form 1041 during 2022?

0 Yes

0 No

What income tax-related activities did the third-party professional perform?

Select all that apply

D Bookkeeping or accounting services

D Completing or revising legal documents

D Estimated income tax payments

D Financial planning services

D Other activities

Fiduciary's Uncompensated Time

Did you spend any time during 2022 on activities related to this Form 1041 for which you were not paid?

0 Yes

Q No

Time Spent

Time Spent on Income Tax-Related Activities

This question asks about all the uncompensated time you spent on activities related to the 2022 Form 1041 income tax return. These activities include completing, preparing, and submitting the 2022 Form 1041 income tax return and handling issues for one or more of the previously-filed Form 1041 income tax returns.

Think about the time you spent on tax-related recordkeeping, tax planning, gathering tax related materials, learning about tax law, using IRS or non-IRS resources, preparing and providing Schedules K-1, and calculating and depositing estimated tax payments.

Please include time spent:

- On the Form 1041 income tax return as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season, as applicable
- Corresponding or speaking with paid or volunteer tax professional(s), if any
- Preparing or providing Schedules K-1 to beneficiaries

Please do NOT include time spent:

- By paid or volunteer tax professional(s)
- On individual or business federal, state, or local income tax returns
- On non-income tax returns, such as Form 709 (Gift Tax Return), Form 706 (Estate Tax Return), or excise taxes
- On foreign tax returns
- On information returns other than the beneficiaries' Schedules K-1 (e.g., Form 1099-MISC)

How much time did you spend on the following activities for the 2022 Form 1041 income tax return?

If you're not sure, please provide your best estimate. If you did not spend any time on the activity, enter 0.

	Hours	Minutes
A. Tax recordkeeping, including reconciling financial and tax records		
B. Tax planning		
C. Gathering materials, learning about tax law, and using IRS or non-IRS resources		
D. Calculating, reviewing, and paying estimated income tax payments		
E. Completing and filing the Form 1041		
F. Calculating and reviewing distributions and accumulations		
G. Preparing and providing Schedules K-1		
H. Resolving issues with one or more previously-filed Forms 1041		

You reported spending a total of 0 hours and 0 minutes on activities for the 's 2022 Form 1041 income tax return.

If you would you like to review your answers click **Back**, otherwise click **Next** to proceed.

Trust Costs V2

Costs Associated with Tax Compliance

Think about how much money was spent to comply with reporting obligations related to the 2022 Form 1041 income tax return.

Costs associated with tax compliance are a very important part of assessing burden. If you're not sure, please provide your best estimate. If you did not spend any money on the activity, enter 0. ***Do not include any income tax paid.***

What were the total fees paid for tax-related services? Include amounts paid to third-party professionals and additional fees paid to the fiduciary specifically for these services, if any.

\$. _____

How much of these fees were paid for

	Amount
Tax planning	\$ _____
Completing and filing the 2022 Form 1041	\$ _____
Resolving issues with one or more previously-filed Forms 1041	\$ _____
Other tax-related activities	\$ _____

How much money was spent for online tax preparation software, including online software, (e.g., TurboTax®, H&R Block®, CCH®, custom software) to prepare the 2022 Form 1041 income tax return?

\$. _____

How much money was spent on other tax-related activities related to the Form 1041 income tax reporting requirements for 2022? Include money spent on

electronic submission, photocopies, tax research services, tax publications and journals, transportation, postage, or IRS user fees.

\$

Additional Questions

Additional Questions

How many 2022 state income tax returns were filed based on this federal Form 1041?

Did you serve as fiduciary for more than one trust or estate in 2022?

0 Yes

Q No

How are the distributions from the trust calculated?

Select all that apply

D All distributable net income (DNI) must be distributed (simple trust)

D Percentage of income

D Trustee discretion (e.g., for beneficiary's education, support, or medical expenses)

D Beneficiary age

D Other

D Not applicable

What are the most challenging aspects of complying with the Form 1041 reporting requirements?

Please provide any suggestions for how the IRS could improve the Form 1041 reporting experience or taxpayer service in general.

End of Survey

You have finished the survey.

Please click on the "Submit" button on the bottom right to submit your survey.
Once the survey is submitted, you will not be able to return to the survey.

At any time you can leave the survey and come back to complete it.
The survey will pick up after the last page you completed.

[FAQ](#)
[Trust and Estate Income Tax Burden Survey Preview](#)

Technical Assistance 1.202.803.9147 or raas.irs.taxpayer.surveys@irs.gov

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