

**Beneficiary's Share of Income, Deductions,
Credits, etc.**

For calendar year or tax year beginning

20

Part I: Information About the Estate or Trust

A. Estate's or trust's employer identification number:

B. Estate's or trust's name:

C. Fiduciary's name, address, city, state, and ZIP code:

D. Check if Form 1041-T was filed:

E. Check if final K-1: Amended K-1:

Part II: Information About the Beneficiary

F. Beneficiary's identifying number:

G. Beneficiary's name, address, city, state, and ZIP code:

H. Beneficiary's classification:

Individual Trust/Estate Other

I. Is the beneficiary a domestic or foreign beneficiary?

Domestic Foreign

PART III: BENEFICIARY'S SHARE OF CURRENT YEAR INCOME, DEDUCTIONS, CREDITS, AND OTHER ITEMS

Line	Type of Income / Deduction / Credit	Amount	IRS Form 1040 Reporting / Instructions
1	Interest income		
2a	Ordinary dividends		
2b	Qualified dividends		
3	Net short-term capital gain		
4a	Net long-term capital gain (28% rate gain)		
4b	Unrecaptured section 1250 gain		
5	Other portfolio and nonbusiness income		
6	Ordinary business income		
7	Net rental real estate income		
8	Other rental income		
9	Directly apportioned deductions		
10	Estate tax deduction		
11	Final year deductions		
12	Alternative minimum tax (AMT) items		
13	Credits and credit recapture		
14	Other information		