

ESTATE BENEFICIARY TAX RETURN INFORMATION

Schedule of Share of Income, Deductions, Credits, etc.

Part I: Information About the Estate

A. ESTATE NAME

B. EMPLOYER IDENTIFICATION NUMBER (EIN)

C. EXECUTOR / FIDUCIARY NAME & TITLE

D. EXECUTOR / FIDUCIARY ADDRESS

Part II: Information About the Beneficiary

E. BENEFICIARY'S NAME

F. BENEFICIARY'S TAXPAYER IDENTIFICATION NUMBER (TIN/SSN)

G. BENEFICIARY'S ADDRESS

H. BENEFICIARY'S SHARE PERCENTAGE (%)

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

Line	Description of Item	Amount (\$)
1	Interest income	
2a	Ordinary dividends	
2b	Qualified dividends	
3	Net short-term capital gain	
4a	Net long-term capital gain	
4b	28% rate gain	
4c	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 (Depreciation/Depletion)	
10	Estate tax deduction	
11	Final year deductions	
12	Alternative Minimum Tax (AMT) items	

Line	Description of Item	Amount (\$)
13	Credits and credit recapture	
14	Other information / Foreign taxes paid	

SIGNATURE OF FIDUCIARY / PREPARER

DATE
