

**SCHEDULE B-T**  
(Form 1041-T)

**TRUST BENEFICIARY TAX SCHEDULE**  
Beneficiary's Share of Income, Deductions,  
Credits, etc.

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**PART I: INFORMATION ABOUT THE TRUST**

**A. Trust Identification Number**

\_\_\_\_\_

**B. Name of Trust**

\_\_\_\_\_

**C. Trustee Name, Address, City, State, and ZIP Code**

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**PART II: INFORMATION ABOUT THE BENEFICIARY**

**D. Beneficiary's Identifying Number**

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**E. Beneficiary's Name, Address, City, State, and ZIP Code**

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\_\_\_\_\_

**F. Beneficiary Type**

Domestic  Foreign

**G. Resident Status**

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

| Line | Description of Item                    | Amount | Tax Form Reference |
|------|--|--------|--------------------|
| 1    | Interest Income                        |        |                    |
| 2a   | Ordinary Dividends                     |        |                    |
| 2b   | Qualified Dividends                    |        |                    |
| 3    | Net Short-Term Capital Gain            |        |                    |
| 4a   | Net Long-Term Capital 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   | Alternative Minimum Tax (AMT) Items    |        |                    |
| 12   | Tax-Exempt Interest                    |        |                    |
| 13   | Credits and Credit Recapture           |        |                    |
| 14   | Other Information                      |        |                    |