

► Information about Form 1041 and its separate instructions is at www.irs.gov/form1041.

A Check all that apply: ☐ Decedent's estate ☐ Simple trust ☐ Complex trust ☐ Qualified disability trust ☐ ESBT (S portion only) ☐ Grantor type trust ☐ Bankruptcy estate-Ch. 7 ☐ Bankruptcy estate-Ch. 11 ☐ Pooled income fund		For calendar year 2012 or fiscal year beginning _____, 2012, and ending _____, 20 Name of estate or trust (If a grantor type trust, see the instructions.) Name and title of fiduciary Number, street, and room or suite no. (If a P.O. box, see the instructions.) City or town, state, and ZIP code		C Employer identification number D Date entity created E Nonexempt charitable and split-interest trusts, check applicable box(es), see instructions. ☐ Described in sec. 4947(a)(1). Check here if not a private foundation . . . ► ☐ ☐ Described in sec. 4947(a)(2)
B Number of Schedules K-1 attached (see instructions) ►		F Check applicable boxes: ☐ Initial return ☐ Final return ☐ Amended return ☐ Change in fiduciary ☐ Change in fiduciary's name ☐ Change in fiduciary's address		☐ Change in trust's name ☐ Change in fiduciary's address
G Check here if the estate or filing trust made a section 645 election ► ☐				

Income	1 Interest income	1		
	2a Total ordinary dividends	2a		
	b Qualified dividends allocable to: (1) Beneficiaries _____ (2) Estate or trust _____			
	3 Business income or (loss). Attach Schedule C or C-EZ (Form 1040)	3		
	4 Capital gain or (loss). Attach Schedule D (Form 1041)	4		
	5 Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 1040)	5		
	6 Farm income or (loss). Attach Schedule F (Form 1040)	6		
	7 Ordinary gain or (loss). Attach Form 4797	7		
	8 Other income. List type and amount _____	8		
9 Total income. Combine lines 1, 2a, and 3 through 8 ►	9			
Deductions	10 Interest. Check if Form 4952 is attached ► ☐	10		
	11 Taxes	11		
	12 Fiduciary fees	12		
	13 Charitable deduction (from Schedule A, line 7)	13		
	14 Attorney, accountant, and return preparer fees	14		
	15a Other deductions not subject to the 2% floor (attach schedule)	15a		
	b Allowable miscellaneous itemized deductions subject to the 2% floor	15b		
	16 Add lines 10 through 15b ►	16		
	17 Adjusted total income or (loss). Subtract line 16 from line 9 17			
	18 Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 1041)	18		
	19 Estate tax deduction including certain generation-skipping taxes (attach computation)	19		
20 Exemption	20			
21 Add lines 18 through 20 ►	21			
Tax and Payments	22 Taxable income. Subtract line 21 from line 17. If a loss, see instructions	22		
	23 Total tax (from Schedule G, line 7)	23		
	24 Payments: a 2012 estimated tax payments and amount applied from 2011 return	24a		
	b Estimated tax payments allocated to beneficiaries (from Form 1041-T)	24b		
	c Subtract line 24b from line 24a	24c		
	d Tax paid with Form 7004 (see instructions)	24d		
	e Federal income tax withheld. If any is from Form(s) 1099, check ► ☐	24e		
	Other payments: f Form 2439 _____; g Form 4136 _____; Total ►	24h		
	25 Total payments. Add lines 24c through 24e, and 24h ►	25		
	26 Estimated tax penalty (see instructions)	26		
27 Tax due. If line 25 is smaller than the total of lines 23 and 26, enter amount owed	27			
28 Overpayment. If line 25 is larger than the total of lines 23 and 26, enter amount overpaid	28			
29 Amount of line 28 to be: a Credited to 2013 estimated tax ► ; b Refunded ►	29			

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Paid Preparer Use Only	Signature of fiduciary or officer representing fiduciary		Date	EIN of fiduciary if a financial institution	May the IRS discuss this return with the preparer shown below (see instr.)? ☐ Yes ☐ No
	Print/Type preparer's name		Preparer's signature	Date	
	Firm's name ►		Firm's EIN ►		
	Firm's address ►		Phone no.		

Schedule A Charitable Deduction. Do not complete for a simple trust or a pooled income fund.

1	Amounts paid or permanently set aside for charitable purposes from gross income (see instructions)	1		
2	Tax-exempt income allocable to charitable contributions (see instructions)	2		
3	Subtract line 2 from line 1	3		
4	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes	4		
5	Add lines 3 and 4	5		
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes (see instructions)	6		
7	Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13	7		

Schedule B Income Distribution Deduction

1	Adjusted total income (see instructions)	1		
2	Adjusted tax-exempt interest	2		
3	Total net gain from Schedule D (Form 1041), line 15, column (1) (see instructions)	3		
4	Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion)	4		
5	Capital gains for the tax year included on Schedule A, line 1 (see instructions)	5		
6	Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss as a positive number	6		
7	Distributable net income. Combine lines 1 through 6. If zero or less, enter -0-	7		
8	If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law	8		
9	Income required to be distributed currently	9		
10	Other amounts paid, credited, or otherwise required to be distributed	10		
11	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions	11		
12	Enter the amount of tax-exempt income included on line 11	12		
13	Tentative income distribution deduction. Subtract line 12 from line 11	13		
14	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0-	14		
15	Income distribution deduction. Enter the smaller of line 13 or line 14 here and on page 1, line 18	15		

Schedule G Tax Computation (see instructions)

1	Tax:	a	Tax on taxable income (see instructions)	1a			
	b	Tax on lump-sum distributions. Attach Form 4972	1b				
	c	Alternative minimum tax (from Schedule I (Form 1041), line 56)	1c				
	d	Total. Add lines 1a through 1c				1d	
2a	Foreign tax credit. Attach Form 1116	2a					
b	General business credit. Attach Form 3800	2b					
c	Credit for prior year minimum tax. Attach Form 8801	2c					
d	Bond credits. Attach Form 8912	2d					
3	Total credits. Add lines 2a through 2d					3	
4	Subtract line 3 from line 1d. If zero or less, enter -0-					4	
5	Recapture taxes. Check if from: ☐ Form 4255 ☐ Form 8611					5	
6	Household employment taxes. Attach Schedule H (Form 1040)					6	
7	Total tax. Add lines 4 through 6. Enter here and on page 1, line 23					7	

Other Information

	Yes	No
1 Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses. Enter the amount of tax-exempt interest income and exempt-interest dividends ► \$		
2 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement?		
3 At any time during calendar year 2012, did the estate or trust have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►		
4 During the tax year, did the estate or trust receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," the estate or trust may have to file Form 3520. See instructions		
5 Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see the instructions for required attachment		
6 If this is an estate or a complex trust making the section 663(b) election, check here (see instructions) ► ☐		
7 To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here (see instructions) ► ☐		
8 If the decedent's estate has been open for more than 2 years, attach an explanation for the delay in closing the estate, and check here ► ☐		
9 Are any present or future trust beneficiaries skip persons? See instructions		

2012

For calendar year 2012,
or tax year beginning _____, 2012,
and ending _____, 20

Beneficiary's Share of Income, Deductions, Credits, etc. ▶ See back of form and instructions

► See back of form and instructions.

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 and enter the date it was filed

E ☐ Check if this is the final Form 1041 for the estate or trust

Part II Information About the Beneficiary

F Beneficiary's identifying number

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

H ☐ Domestic beneficiary

☐ Foreign beneficiary

Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items

1	Interest income
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11	Final year deductions
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2a	Ordinary dividends
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2b	Qualified dividends
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3	Net short-term capital gain
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4a	Net long-term capital gain
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4b	28% rate gain
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12	Alternative minimum tax adjustment
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4c	Unrecaptured section 1250 gain
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5	Other portfolio and nonbusiness income
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6	Ordinary business income
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7	Net rental real estate income
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13	Credits and credit recapture
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8	Other rental income
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9	Directly apportioned deductions
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14	Other information
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10	Estate tax deduction
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*See attached statement for additional information.

Note. A statement must be attached showing the beneficiary's share of income and directly apportioned deductions from each business, rental real estate, and other rental activity.

For IRS Use Only

**Schedule K-1
(Form 1041)**

Department of the Treasury
Internal Revenue Service

2012

For calendar year 2012,
or tax year beginning _____, 2012,
and ending _____, 20 _____

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

► See back of form and instructions.

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 and enter the date it was filed

E ☐ Check if this is the final Form 1041 for the estate or trust

Part II Information About the Beneficiary

F Beneficiary's identifying number

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

H ☐ Domestic beneficiary

☐ Foreign beneficiary

☐ Final K-1

☐ Amended K-1

661112

OMB No. 1545-0092

**Part III Beneficiary's Share of Current Year Income,
Deductions, Credits, and Other Items**

1	Interest income	11	Final year deductions
2a	Ordinary dividends		
2b	Qualified dividends		
3	Net short-term capital gain		
4a	Net long-term capital gain		
4b	28% rate gain	12	Alternative minimum tax adjustment
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	13	Credits and credit recapture
9	Directly apportioned deductions		
		14	Other information
10	Estate tax deduction		

*See attached statement for additional information.

Note. A statement must be attached showing the beneficiary's share of income and directly apportioned deductions from each business, rental real estate, and other rental activity.

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