

**Form 1041**

**U.S. Income Tax Return for Qualified  
Funeral Trusts**

OMB No. 1545-1593

Department of the Treasury  
Internal Revenue Service

► Go to [www.irs.gov/Form1041QFT](https://www.irs.gov/Form1041QFT) for instructions and the latest information.

**2023**



Form 1041-QFT (Rev. 2023) Catalog Number 73472A  
Department of the Treasury **Internal Revenue Service** [www.irs.gov](https://www.irs.gov)



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For calendar year 2023 or short year beginning \_\_\_\_\_, 2023, and ending \_\_\_\_\_, 2023.

**Part I General Information**

1 Name of trust or other entity filing return	2 Employer identification number (EIN)
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3a Name and title of trustee

3b Number, street, and room or suite no. (If a P.O. box, see the instructions.)

3c City or town, state, and ZIP code	4 Number of QFTs included on this return
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5 Check applicable boxes:

Initial return    
  Amended return    
  Final return    
  Change in the fiduciary or fiduciary's name    
  Change in fiduciary's address

**Part II Tax Computation**

<b>Income</b>	<b>1a</b>	Interest income . . . . .	<b>1a</b>	
	<b>b</b>	Tax-exempt interest. Don't include on line 1a . . . . .	<b>1b</b>	
	<b>2a</b>	Total ordinary dividends . . . . .	<b>2a</b>	
	<b>b</b>	Qualified dividends . . . . .	<b>2b</b>	
	<b>3</b>	Capital gain or (loss) (attach Schedule D (Form 1041)) . . . . .	<b>3</b>	
	<b>4</b>	Other income. List type and amount _____	<b>4</b>	
	<b>5</b>	Total income. Combine lines 1a, 2a, 3, and 4 . . . . .	<b>5</b>	

<b>Deductions</b>	<b>6</b>	Taxes . . . . .	<b>6</b>	
	<b>7</b>	Trustee fees . . . . .	<b>7</b>	
	<b>8</b>	Attorney, accountant, and return preparer fees . . . . .	<b>8</b>	
	<b>9</b>	Other deductions . . . . .	<b>9</b>	
	<b>10</b>	Total deductions. Add lines 6 through 9 . . . . .	<b>10</b>	
<b>Tax and Payments</b>	<b>11</b>	<b>Taxable income.</b> Subtract line 10 from line 5 . . . . .	<b>11</b>	
	<b>12</b>	<b>Tax.</b> (If this is a composite return, check here <input type="checkbox"/> ) . . . . .	<b>12</b>	
	<b>13</b>	Credits (see instructions). Specify the credits claimed _____	<b>13</b>	
	<b>14</b>	Subtract line 13 from line 12 . . . . .	<b>14</b>	
	<b>15</b>	Net Investment Income Tax from Form 8960, line 21 . . . . .	<b>15</b>	
	<b>16</b>	<b>Total tax.</b> Add lines 14 and 15 . . . . .	<b>16</b>	
	<b>17</b>	Payments (see instructions) . . . . .	<b>17</b>	
	<b>18</b>	Elective payment election amount from Form 3800 . . . . .	<b>18</b>	
	<b>19</b>	<b>Tax due.</b> If the total of lines 17 and 18 is smaller than line 16, enter amount owed . . . . .	<b>19</b>	
	<b>20</b>	<b>Overpayment.</b> If the total of lines 17 and 18 is larger than line 16, enter amount overpaid . . . . .	<b>20</b>	
	<b>21</b>	Amount of line 20 to be: <b>a Credited to 2024 estimated tax</b> <span style="float:right;"><b>b Refunded</b></span>	<b>21</b>	
<b>Sign Here</b>	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 trustee) is based on all information of which preparer has any knowledge.			
	_____ Signature of trustee or officer representing trustee		_____ Date	
	May the IRS discuss this return with the preparer shown below? See instr. <input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed
	Firm's name		Firm's EIN	
	Firm's address		Phone no.	