

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 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



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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**

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

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