

Form Department of the Treasury Internal Revenue Service

beginning....., 1983, and ending....., 19.....

- Check applicable boxes:
Decedent's estate
Simple trust (\$300)
Complex trust (\$100)
Complex trust (\$300)
Grantor type trust
Ancillary return
Bankruptcy estate
Generation-skipping trust
Testamentary trust
Family estate trust
Pooled income fund

Name of estate or trust (Grantor type trust, see instructions)
Name and title of fiduciary
Address of fiduciary (number and street)
City, State, and ZIP code
First return
Final return
Amended return
Change in fiduciary's
Name or
Address

Employer identification number
Nonexempt charitable and split-interest trusts check applicable boxes (See instructions):
Described in section 4947(a)(1)
Not treated as a private foundation
Described in section 4947(a)(2)
For Paperwork Reduction Act Notice, see page 1 of the instructions.

Income section table with rows 1-10. Includes Dividends, Interest income, Partnership income, Income from another estate or trust, Gross rent and royalty income, Net rent and royalty income, Net business and farm income, Capital gain, Ordinary gain, Other income, Total income.

Deductions section table with rows 11-25. Includes Interest, Taxes, Charitable deduction, Fiduciary fees, Attorney, accountant, and return preparer fees, Other deductions, Total (Add lines 11 through 16), Subtract line 17 from line 10, Income distribution deduction, Dividend and interest exclusion, Estate tax deduction, Long-term capital gain deduction, Exemption, Total (Add lines 19 through 23), Taxable income of fiduciary.

Computation of Tax section table with rows 26-38. Includes Tax: a Tax rate schedule, b Other tax, Total; Credits: a Foreign tax, b Investment, c Jobs, Total; Credits: a Alcohol fuel, b Nonconventional fuel, c Research, Total; Total (Add lines 27d and 28d); Balance (Subtract line 29 from line 26c); Tax from recomputing prior year investment credit; Alternative minimum tax; Total (Add lines 30 through 32); Credits: a Form 2439, b Form 4136, c Form 6249, Total; Federal income tax: a Previously paid, b Withheld, Total; Total (Add lines 34d and 35c); Balance of tax due (Subtract line 36 from line 33); Overpayment (Subtract line 33 from line 36).

Please 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 fiduciary) is based on all information of which preparer has any knowledge.
Signature of fiduciary or officer representing fiduciary
Date
Preparer's signature
Date
Check if self-employed
Preparer's social security no.
Firm's name (or yours, if self-employed) and address
E.I. No.
ZIP code

Do not complete Schedules A and B for a simple trust

SCHEDULE A.—Charitable Deduction

(Write the name and address of the charitable organizations on an attached sheet.)

1	Amounts paid or permanently set aside for charitable purposes from current year's gross income	1		
2	Tax-exempt interest allocable to charitable distribution (See instructions)	2		
(Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b), exceeds loss on Schedule D (Form 1041), line 15, column (b).)				
3	Long-term capital gain included on line 1 (See instructions)	3		
4	Enter gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (b)	4		
5	Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c)	5		
6	Enter 60% of the amount on line 3, 4, or 5, whichever is the smallest	6		
7	Add line 2 and line 6.	7		
8	Balance (Subtract line 7 from line 1)	8		
9	Enter the short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes	9		
10	Amounts paid or permanently set aside for charitable purposes from gross income of a prior year (See instructions)	10		
11	Total (Add lines 8, 9, and 10). Enter here and on page 1, line 13	11		

SCHEDULE B.—Income Distribution Deduction

1	Enter amount from page 1, line 18, if the amount on page 1, line 10, exceeds the amount on page 1, line 17	1		
2	Tax-exempt interest, as adjusted (See instructions)	2		
3	Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero	3		
4	Add Schedule A, line 9, and 40% of the amount on Schedule A, line 3, 4, or 5, whichever is the smallest	4		
5	Short-term capital gain included on Schedule A, line 1	5		
6	If amount on page 1, line 7, is a loss, enter amount here as a positive figure	6		
7	Total (Add lines 1 through 6)	7		
8	If amount on page 1, line 7, is a gain, enter amount here	8		
9	Distributable net income (Subtract line 8 from line 7)	9		
10	If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income)	10		
11	Amount of income required to be distributed currently (See instructions)	11		
12	Other amounts paid, credited, or otherwise required to be distributed (See instructions)	12		
13	Total (Add lines 11 and 12) (If greater than line 10, see instructions)	13		
14	Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (See instructions)	14		
15	Balance (Subtract line 14 from line 13)	15		
16	Enter distributable net income from line 9	16		
17	Enter the amount from line 2	17		
18	Balance (Subtract line 17 from line 16)	18		
19	Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less	19		

Other Information

	Yes	No
1 Date trust was created or, if an estate, date of decedent's death ▶		
2 Did the estate or trust receive tax-exempt income? (If "Yes," attach a computation of the allocation of expenses)		
3 If a complex trust making the section 663(b) election, check the "Yes" box		
4 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?		
5 At any time during the tax year did the estate or trust have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? (See the instructions for question 5) If "Yes," write the name of the foreign country ▶		
6 Was the estate or trust the grantor of, or transferor to, a foreign trust which existed during the current tax year, whether or not the estate or trust has any beneficial interest in it? (If "Yes," you may have to file Form 3520, 3520-A, or 926)		