



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax  
Beneficiary Information**

For the calendar year 2007 or fiscal year beginning

\_\_\_\_\_, 2007, and ending \_\_\_\_\_, \_\_\_\_\_

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

▶ See 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**  Grantor trust

**Part II – Information About the Beneficiary**

**H** Beneficiary's identifying number

**I** Beneficiary's name, address, city, state, and ZIP code

**J**  Alabama resident  Nonresident

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

<b>1</b> Interest income	<b>10a</b> Grantor trust income (resident beneficiaries only)
<b>2</b> Ordinary dividends	<b>10b</b> Grantor trust deduction (resident beneficiary only)
<b>3</b> Business income (loss)	<b>10c</b> Net grantor trust income (resident beneficiary only)
<b>4</b> Net Alabama capital gain or (loss)	<b>11</b> Nonresident beneficiary Alabama source income
<b>5</b> Rents, royalties, partnerships, and other estates and trusts	<b>12</b> Nonresident beneficiary non-Alabama source income
<b>6</b> Farm income or (loss)	<b>13</b> <b>Directly apportioned deductions:</b>
<b>7</b> Ordinary gain or (loss) from Form 4797	<b>13a</b> Depreciation
<b>8</b> Other income (attach explanation)	<b>13b</b> Depletion
	<b>13c</b> Amortization
<b>9</b> Alabama Tax Exempt Income	<b>14</b> Other 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.