



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax
Beneficiary Information**

For the calendar year 2009 or fiscal year beginning

_____, 2009, 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

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B Estate's or trust's name

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C Fiduciary's name, address, city, state, and ZIP code

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D • Grantor trust

Part II – Information About the Beneficiary

H Beneficiary's identifying number

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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

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

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.