



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax
Beneficiary Information**

For the calendar year 2011 or fiscal year beginning

_____, 2011, 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

•

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

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D • Grantor trust

Part II – Information About the Beneficiary

E Beneficiary's identifying number

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F Beneficiary's name, address, city, state, and ZIP code

•

G • Alabama resident • Nonresident

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

1 Interest income •	10a Grantor trust income •
2 Ordinary dividends •	10b Grantor trust deduction •
3 Business income (loss) •	10c Net grantor trust income •
4 Net Alabama capital gain or (loss) •	11 Nonresident beneficiary/grantor Alabama source income •
5 Rents, royalties, partnerships, and other estates and trusts •	12 Nonresident beneficiary/grantor non-Alabama source income •
6 Farm income or (loss) •	13 Directly apportioned deductions: 13a Depreciation •
7 Ordinary gain or (loss) from Form 4797 •	13b Depletion •
8 Other income (attach explanation) •	13c Amortization •
9 Alabama Tax Exempt Income •	14 Allocated composite payment •
	15 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.