



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax  
Beneficiary Information**

For the calendar year 2008 or fiscal year beginning

\_\_\_\_\_, 2008, 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

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**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 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>9</b> Alabama Tax Exempt Income •	<b>13c</b> Amortization •	
	<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.