



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax
Beneficiary Information**

For the calendar year 2016 or fiscal year beginning

_____, 2016, 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

•

Part II – Information About the Beneficiary

D Beneficiary's identifying number

•

E Beneficiary's name

•

F Address — Street

•

G City State Zip Code

•

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•

H • Alabama resident • Nonresident

I Beneficiary's percentage of allocated income

•

PART III – Beneficiary's Share of Current Year Alabama Income, Deductions, and Credit

Non Alabama Resident

Alabama Resident

1 Interest income

•
 NR Exempt

1 Interest income

•

2 Ordinary dividends

•
 NR Exempt

2 Ordinary dividends

•

3 Net Alabama capital gain or (loss)

•
 NR Exempt

3 Net Alabama capital gain or (loss)

•

4 Business income (loss)

•

4 Business income (loss)

•

5a Rents, royalties, partnerships, and S corps

•

5a Rents, royalties, partnerships, and S corps

•

5b Estates and Trusts

•

5b Estates and Trusts

•

6 Farm Income or (loss)

•

6 Farm Income or (loss)

•

7 Ordinary gain or (loss) from Form 4797

•

7 Ordinary gain or (loss) from Form 4797

•

8 Other Income

•

8 Other Income

•

9

9

10 Alabama Tax Exempt Income

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10 Alabama Tax Exempt Income

•

11 Depreciation

•

11 Depreciation

•

12 Depletion

•

12 Depletion

•

13 Amortization

•

13 Amortization

•

14 Allocated composite payment

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