



ALABAMA DEPARTMENT OF REVENUE
Fiduciary Income Tax Beneficiary Information

Tax year beginning _____, 2018 and ending _____, 20____

Information about the Beneficiary

BENEFICIARY'S IDENTIFYING NUMBER
●

NAME
●

STREET ADDRESS
●

CITY STATE ZIP
● ● ●

WHAT TYPE OF ENTITY IS THIS BENEFICIARY
●

● Alabama resident ● Nonresident

Beneficiary's percentage of allocated income ●

Information about the Estate or Trust

ESTATE'S OR TRUST'S EMPLOYER IDENTIFICATION NUMBER

ESTATE'S OR TRUST'S NAME

STREET ADDRESS

CITY STATE ZIP

FIDUCIARY'S NAME

Beneficiary's Share of Current Year Alabama Income, Deductions, and Other Items

| | (a) Alabama Distributable Income | (b) Nonresident Non-Alabama Source Income | (c) Reportable Alabama Income |
|---|----------------------------------|---|-------------------------------|
| 1 Interest income | ● | ● | ● |
| 2 Dividend income | ● | ● | ● |
| 3 Capital gain or (loss) | ● | ● | ● |
| 4 Business income or (loss) | ● | ● | ● |
| 5a Rent, royalties, partnerships and S corporations | ● | ● | ● |
| 5b Estates and Trusts | ● | ● | ● |
| 6 Farm income or (loss) | ● | ● | ● |
| 7 Ordinary gain or (loss) from Form 4797 | ● | ● | ● |
| 8 Other income | ● | ● | ● |
| 9 RESERVED FOR FUTURE USE | | | |
| 10 RESERVED FOR FUTURE USE | | | |
| 11 Alabama Exempt Income | | | ● |

Directly Apportioned Deductions/Credits

| | |
|---|---|
| 12 Depreciation | ● |
| 13 Depletion | ● |
| 14 Amortization | ● |
| 15 Composite credit | ● |
| 16 Credit for Taxes Paid to a Foreign Country | ● |