



ALABAMA DEPARTMENT OF REVENUE
Fiduciary Income Tax Beneficiary Information

Tax year beginning _____, 2024 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 ●1			
2 Dividend income ●2			
3 Capital gain or (loss) ●3			
4 Business income or (loss) ●4			
5a Rent, royalties, partnerships and S corporations. ●5a			
5b Estates and Trusts ●5b			
6 Farm income or (loss) ●6			
7 Ordinary gain or (loss) from Form 4797 ●7			
8 Other income ●8			
9 RESERVED FOR FUTURE USE			
10 RESERVED FOR FUTURE USE			
11 Alabama Exempt Income ●11			

Directly Apportioned Deductions/Credits

12 Depreciation ●12	
13 Depletion ●13	
14 Amortization ●14	
15 Composite/Electing Pass-Through Credit. ●15	

Credits from Schedule FC

	Code	Maximum Allowable
16a ●16a		
16b ●16b		
16c ●16c		