



AREA RESERVED FOR 2-D BARCODE

2023 Schedule B

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Interest, Dividends and Certain Capital Gains and Losses

NAMEOFESTATEORTRUSTXXXXXXXXXXXXXXXXXXXX ESTTRIDNOXX

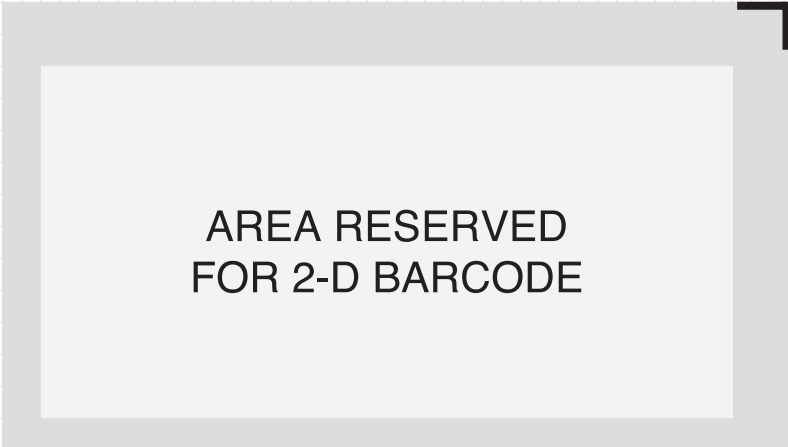
1.	Total interest (from U.S. Form 1041, line 1; or Form 1041-QFT, line 1a)	1	XXXXXXXXXXXXXX
2.	Total dividends (from U.S. Form 1041, line 2a; or Form 1041-QFT, line 2a)	2	XXXXXXXXXXXXXX
3.	Other interest and dividends not included above	3	XXXXXXXXXXXXXX
4.	Total interest and dividends. Add lines 1 through 3	4	XXXXXXXXXXXXXX
5.	Interest on U.S. debt obligations included in line 4	5	XXXXXXXXXXXXXX
6.	Interest from Massachusetts banks reported in Form 2, line 5 (5.0% income)	6	XXXXXXXXXXXXXX
7a.	Other exclusions (see instructions). Attach list of exclusions, if any	7a	XXXXXXXXXXXXXX
7b.	Non-resident estates or trusts only	7b	XXXXXXXXXXXXXX
8.	Total adjustments. Add lines 5, 6, 7a and 7b	8	XXXXXXXXXXXXXX
9.	Subtotal. Subtract line 8 from line 4	9	XXXXXXXXXXXXXX
10.	Allowable deductions from your trade or business (from Massachusetts Schedule C-2)	10	XXXXXXXXXXXXXX
11.	Subtotal. Subtract line 10 from line 9	11	XXXXXXXXXXXXXX
12.	Short-term capital gains (included in U.S. Form 1041, Schedule D, Part I, lines 1 through 5)	12	XXXXXXXXXXXXXX
13.	Long-term capital gains on collectibles and pre-1996 installment sales (from Massachusetts Schedule D, line 11)	13	XXXXXXXXXXXXXX
14.	Gain on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	14	XXXXXXXXXXXXXX
15a.	Add lines 12 through 14	15a	XXXXXXXXXXXXXX
15b.	Non-resident estates or trusts only	15b	XXXXXXXXXXXXXX
15c.	Subtract line 15b from line 15a. Not less than 0	15c	XXXXXXXXXXXXXX
16.	Allowable deductions from your trade or business (from Massachusetts Schedule C-2)	16	XXXXXXXXXXXXXX
17.	Subtotal. Subtract line 16 from line 15	17	XXXXXXXXXXXXXX
18.	Short-term capital losses (included in U.S. Form 1041, Schedule D, Part I, lines 1 through 5)	18	-XXXXXXXXXXXXXX
19.	Loss on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	19	-XXXXXXXXXXXXXX
20.	Prior short-term losses for years beginning after 1981 (from 2022 Massachusetts Schedule B, line 41)	20	-XXXXXXXXXXXXXX
21a.	Combine lines 17 through 20.	21a	-XXXXXXXXXXXXXX
21b.	Non-resident trusts only. See instructions	21b	-XXXXXXXXXXXXXX
21c.	Subtract line 21b from 21a. If a positive amount, go to line 26. If the total is a loss, go to line 22	21c	-XXXXXXXXXXXXXX
22.	Short-term capital losses applied against interest and dividends. Enter the smaller of line 11 or line 21c (as a positive amount). Not more than \$2,000	22	XXXXXXXXXXXXXX
23.	Subtotal. Combine lines 21c and 22	23	-XXXXXXXXXXXXXX
24.	Short-term capital losses applied against long-term capital gains	24	XXXXXXXXXXXXXX
25.	Short-term losses available for carryover in 2024. Combine lines 23 and 24 and enter result here and in line 41, omit lines 26 through 29, enter "0" in line 30, and complete lines 31 through 40	25	-XXXXXXXXXXXXXX
26.	Short-term gains and long-term gains on collectibles. Enter amount from line 21. See instructions	26	XXXXXXXXXXXXXX
27.	Long-term capital losses applied against short-term capital gains	27	XXXXXXXXXXXXXX

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Interest, Dividends and Certain Capital Gains and Losses

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28.	Subtotal. Subtract line 27 from line 26. Enter result here. If line 28 is 0, omit line 29, and enter 0 in line 30	28	XXXXXXXXXXXXXX
29.	Long-term gains deduction. Complete only if lines 13 and 28 are greater than "0." If line 13 shows a gain, enter 50% of line 13 minus 50% of losses in lines 18, 19, 20 and 27, but not less than "0"	29	XXXXXXXXXXXXXX
30.	Short-term gains after long-term gains deduction. Subtract line 29 from line 28	30	XXXXXXXXXXXXXX
31.	Enter the amount from line 11	31	XXXXXXXXXXXXXX
32.	Short-term losses applied against interest and dividends. Enter the amount from line 22	32	XXXXXXXXXXXXXX
33.	Subtotal. Subtract line 32 from line 31. See instructions	33	XXXXXXXXXXXXXX
34.	Long-term losses applied against interest and dividends (from worksheet in instructions)	34	XXXXXXXXXXXXXX
35.	Adjusted interest and dividends. Subtract line 34 from line 33	35	XXXXXXXXXXXXXX
36.	Adjusted gross interest, dividends and certain capital gains and losses. Add lines 30 and 35. Not less than "0"	36	XXXXXXXXXXXXXX
37.	Expense and fiduciary compensation deduction. Attach Schedule H	37	
37a.	Expense deduction	37a	XXXXXXXXXXXXXX
37b.	Fiduciary compensation	37b	XXXXXXXXXXXXXX
37c.	Total	37c	XXXXXXXXXXXXXX
38.	Taxable interest and dividends and certain capital gains. Subtract line 37 from line 36. Not less than "0"	38	XXXXXXXXXXXXXX
39.	If line 38 is greater than or equal to line 11, enter the amount from line 11 here and on Form 2, line 14. If line 38 is less than line 11, enter line 38 here and on Form 2, line 14	39	XXXXXXXXXXXXXX
40.	Taxable 8.5% and 12% capital gains. Subtract line 39 from line 38. Not less than "0." Enter result here and on Form 2, line 23. If line 13 is greater than 0, see instructions	40	XXXXXXXXXXXXXX
41.	Available short-term losses for carryover in 2024. Enter amount from line 25 only if it is a loss	41	-XXXXXXXXXXXXXX

BE SURE TO SIGN RETURN ON PAGE 1

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