

Oklahoma Nonresident Fiduciary Return of Income

Form 513NR
2020

Barcode
Placeholder

FORM 513NR IS FOR NONRESIDENTS ONLY. RESIDENTS USE FORM 513.

This form must be filed on or before the 15th day
of the fourth month after the close of the taxable year.

IMPORTANT!
Was a Fiduciary Income Tax
Return filed for the
previous year?

For the year January 1 - December 31, 2020, or other taxable year
beginning ending

Yes No

Name of estate or trust

Federal Employer Identification Number

Date entity created

Address of fiduciary (number and street)

Name of fiduciary

Title of fiduciary

City

State or Province

Country

ZIP or Foreign Postal Code:

Place an 'X'
in all applicable
boxes: →

Decedent's Estate
Simple Trust
ESBT
Other (describe):

Grantor Type Trust
Complex Trust
Charitable Trust

Pooled Income Fund
Bankruptcy Estate

Number of Beneficiaries:

Place an 'X' if: (1) Initial return (2) Final return (3) Amended return (See Schedule 513-X on page 4)

PART 1

**Important: Provide a copy of your Federal return. Also provide a
schedule for Oklahoma amounts when different from Federal.**

INCOME (PROVIDE NECESSARY SCHEDULE(S) FOR LINES 2-10)

1	Interest income
2	Dividends
3	Business income or (loss)
4	Capital gain or (loss)
5	Rents, royalties, partnerships, other estates and trusts, etc.
6	Farm income or (loss)
7	Ordinary gain or (loss)
8	Other income (state nature of income)
9	Total income (add lines 1 through 8)

OKLAHOMA ADDITIONS - SEE INSTRUCTIONS

10	State and municipal bond interest (not specifically exempt)
11	Other additions (identify:)
12	Add lines 9, 10 and 11

OKLAHOMA SUBTRACTIONS

13	Interest on U.S. obligations (see instructions)
14	Net operating loss (return must be filed for Loss Year(s))
15	Oklahoma depletion (see instructions)
16	Oklahoma capital gain deduction (provide Form 561NR-F)
17	Income distribution deduction (use Oklahoma Schedule K-1; see instructions)
18	Total Oklahoma subtractions (add lines 13 through 17)
19	Oklahoma adjusted gross income - Oklahoma Source (line 12 minus line 18)
19a	Oklahoma adjusted gross income - All Sources (line 12 minus line 18)
20	Oklahoma Income Percentage (divide line 19 by 19a - enter here and on line 28) (limited to 100%)
21	Interest, taxes, fiduciary fees, attorney, accountant and return preparer fees
22	Federal estate tax deduction, charitable income distribution, other deductions
23	Exemption
24	Total Deductions (add lines 21, 22 and 23)
25	Taxable income of fiduciary (subtract line 24 from line 19a)

Column A

Federal Amount

Column B

Oklahoma Amount

	00	1		00
	00	2		00
	00	3		00
	00	4		00
	00	5		00
	00	6		00
	00	7		00
	00	8		00
	00	9		00
	00	10		00
	00	11		00
	00	12		00
	00	13		00
		14		00
	00	15		00
	00	16		00
	00	17		00
	00	18		00
		19		00
	00	19a		
		20		%
	00	21		
	00	22		
	00	23		
	00	24		
		25		00

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Name of estate or trust:

Federal Employer Identification Number:

Column B
Oklahoma Amount

26	Taxable income of fiduciary (amount shown on line 25, Column B).....	26		00
27	Tax on amount on line 26 (from tax table - see instructions) (this is your base tax)	27		00
28	Oklahoma percentage (enter percentage from line 20).....	28		%
29	Multiply line 27 by line 28 (this is your Oklahoma state income tax) If an ESBT or Charitable Trust, see the instructions and enter "4" in the box. If recapturing the Oklahoma Affordable Housing Tax Credit, add the recaptured credit here and enter a "2" in the box. If making an Oklahoma installment payment pursuant to IRC Sec. 965(h) and 68 O.S. Sec. 2368(K), add the installment payment here and enter a "3" in the box.....	29		00
30	Credits: Enter number in box for type of credit. Provide Form 511CR. (See instructions)	30		00
31	Balance of tax due (subtract line 30 from line 29, but not less than zero).....	31		00
32	2020 Okla. estimated tax payments (i.e. Form(s) OW-8-ESC and prior year overpayment carryforward)	32		00
33	Amount paid with extension request.....	33		00
34	Oklahoma Withholding (provide Form 1099, 500-B or other withholding statement)	34		00
35	Refundable Credits from Form a) 577 b) 578.....	35		00
36	Amount paid with original return and amount paid after it was filed (amended return only)	36		00
37	Any refunds or overpayment applied (amended return only)	37 ()		00
38	Total of lines 32 through 37	38		00
39	If line 38 is larger than line 31, enter amount overpaid	39		00
40	Amount of line 39 to be credited to 2021 estimated tax (original return only) ..	40		00
41	Amount of line 39 to be refunded to you..... Refund ➔	41		00

Want a Faster Refund? ➔

Elect to have your refund directly deposited into your checking or savings account.

For Direct Deposit information, see page 16 of the 513NR Packet.

Is this refund going to or through an account that is located outside of the United States? ☐ Yes ☐ NoDeposit my refund in my: ☐ checking account ☐ savings accountRouting Number: Account Number:

42	If line 31 is larger than line 38 enter tax due	Tax Due ➔	42		00
43	Underpayment of estimated tax interest.....	Annualized ☐	43		00
44	For delinquent payment, add penalty of 5% \$ plus interest at 1.25% per month \$		44		00
45	Total tax, penalty and interest (add lines 42, 43 and 44)	Balance Due ➔	45		00

If you have asked for an extension from the IRS, place an 'X' here and provide a copy with this return
If the Tax Commission may discuss this return with your tax preparer, place an 'X' hereMake check payable to the
Oklahoma Tax CommissionUnder penalties of perjury, I declare I have examined this return, including accompanying statements, and to the best of my knowledge and belief it is true, correct and complete.
If prepared by person other than the taxpayer, this declaration is based on all information of which preparer has any knowledge.

Signature of Fiduciary		Date		Signature of Preparer		Date	
Printed Name of Fiduciary				Printed Name of Preparer			
Title of Fiduciary		Phone Number		Phone Number		Preparer's PTIN	

Remit to Oklahoma Tax Commission, PO Box 26800, Oklahoma City, Oklahoma 73126-0800
The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.

Form 513NR - page 3
Oklahoma
Schedule K-1
Part 2: Beneficiary's Share of
Income and Deductions
2020

For calendar year 2020 or fiscal year beginning _____, 2020
and ending _____, _____.

- ☐
- Amended K-1
-
- ☐
- Final K-1
-
- ☐
- Nonresident

Name of estate or trust

Beneficiary's FEIN/SSN

Estate's or trust's Federal Employer Identification Number

Beneficiary's name, address and ZIP

Fiduciary's name, address and ZIP

INCOME

		FEDERAL	OKLAHOMA
1	Interest..... 1		
2	Dividends..... 2		
3	Short-term capital gain (or loss) 3		
4	Long-term capital gain (or loss) 4		
5	Other taxable income:		
	a. Annuities, royalties and other nonbusiness income 5a		
	b. Trade or business, rental real estate and other business income 5b		
6	State and municipal interest 6		
7	U.S. interest..... 7		

DEDUCTIONS

8	a. Depreciation, depletion, amortization attributable to line 5a 8a		
	b. Depreciation, depletion, amortization attributable to line 5b 8b		
9	Expenses allocable to Federally-exempt income 9		
10	Expenses allocable to Oklahoma-exempt income 10		
11	Deductions in the final year of trust or decedent's estate:		
	a. Excess deductions on termination 11a		
	b. Net operating loss carryover 11b		
12	Withholding 12		
13	Other:		
	a. _____ 13a		
	b. _____ 13b		
	c. _____ 13c		
	d. _____ 13d		
	e. _____ 13e		
	f. _____ 13 f		
	g. _____ 13g		

Name of estate or trust:

SCHEDULE 513NR-X: AMENDED RETURN SCHEDULE

- C** Explanation or Reason for Amended Return (Provide all necessary schedules):

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

An overpayment on an amended return may not be credited to estimated tax, but will be refunded. The amount applied to estimated tax on the original return cannot be adjusted.