



ALABAMA DEPARTMENT OF REVENUE

**Fiduciary Income Tax
Beneficiary Information**

For the calendar year 2017 or fiscal year beginning

_____, 2017, and ending _____, _____

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

▶ 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 Other Items

| Non Alabama Resident | Alabama Resident |
|--|--|
| 1 Interest income • • <input type="checkbox"/> NR Exempt | 1 Interest income • |
| 2 Ordinary dividends • • <input type="checkbox"/> NR Exempt | 2 Ordinary dividends • |
| 3 Net Alabama capital gain or (loss) • • <input type="checkbox"/> 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 Non Alabama Source Income • | 9 |
| 10 | 10 |
| 11 Alabama Tax Exempt Income • | 11 Alabama Tax Exempt Income • |
| 12 Depreciation • | 12 Depreciation • |
| 13 Depletion • | 13 Depletion • |
| 14 Amortization • | 14 Amortization • |
| 15 Allocated composite payment • | |