



2023 Schedule IDD

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Income Distribution Deduction

AREA RESERVED
FOR 2-D BARCODE

NAMEOFESTATEORTRUSTXXXXXXXXXXXXXXXXXXXX ESTTRIDNOXX

Part 1. Income distribution deduction — Part B Income

- 1. Total Part B 5.0% income. From line 9 of Form 2 1 XXXXXXXXXXXXXXX
- 2. Enter the amount of total Part B 5.0% income included in line 1 required to be distributed currently 2 XXXXXXXXXXXXXXX
- 3. Enter any other amounts included in line 1 paid, credited or otherwise required to be distributed 3 XXXXXXXXXXXXXXX
- 4. Total distributions. Add lines 2 and 3 4 XXXXXXXXXXXXXXX
- 5. Income distribution deduction. Enter the smaller of line 1 or line 4 here and on line 10 of Form 2 5 XXXXXXXXXXXXXXX

Part 2. Income distribution deduction — Part A Interest and Dividend Income

- 6. Total Part A 5.0% interest and dividend income. From line 16 of Form 2 6 XXXXXXXXXXXXXXX
- 7. Enter the amount of total Part A 5.0% interest and dividend income included in line 6 required to be distributed currently 7 XXXXXXXXXXXXXXX
- 8. Enter any other amounts included in line 6 paid, credited or otherwise required to be distributed 8 XXXXXXXXXXXXXXX
- 9. Total distribution. Add lines 7 and 8 9 XXXXXXXXXXXXXXX
- 10. Income distribution deduction. Enter the smaller of line 6 or line 9 here and on line 17 of Form 2 10 XXXXXXXXXXXXXXX

Part 3. Income distribution deduction — Part A 8.5% and 12% Capital Gains

- 11. Total Part A 8.5% and 12% capital gains. From line 25 of Form 2 11 XXXXXXXXXXXXXXX
- 12. Enter the amount of total Part A 8.5% and 12% capital gains included in line 11 required to be distributed currently 12 XXXXXXXXXXXXXXX
- 13. Enter any other amounts included in line 11 paid, credited, or otherwise required to be distributed 13 XXXXXXXXXXXXXXX
- 14. Total distribution. Add lines 12 and 13 14 XXXXXXXXXXXXXXX
- 15. Income distribution deduction. Enter the smaller of line 11 or line 14 here and on line 26 of Form 2 15 XXXXXXXXXXXXXXX

Part 4. Income distribution deduction — Part C 5.0% Capital Gains

- 16. Total Part C 5.0% long-term capital gains. From line 33 of Form 2 16 XXXXXXXXXXXXXXX
- 17. Enter the amount of total Part C 5.0% long-term capital gains included in line 16 required to be distributed currently 17 XXXXXXXXXXXXXXX
- 18. Enter any other amounts included in line 16 paid, credited, or otherwise required to be distributed 18 XXXXXXXXXXXXXXX
- 19. Total distributions. Add lines 17 and 18 19 XXXXXXXXXXXXXXX
- 20. Income distribution deduction. Enter the smaller of line 16 or line 19 here and on line 34 of Form 2 20 XXXXXXXXXXXXXXX

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