



Massachusetts Department of Revenue
Form 2 Fiduciary Income Tax Return

2023

Tax year beginning

Tax year ending

MMDDYYYY

MMDDYYYY

Calendar year filers enter 01-01-2023 and 12-31-2023 below; fiscal year filers enter appropriate dates

NAME OF ESTATE OR TRUST

[Grid for name of estate or trust]

ESTATE OR TRUST EMPLOYER IDENTIFICATION NUMBER

[Grid for EITIN]

NAME OF FIDUCIARY

[Grid for name of fiduciary]

TITLE OF FIDUCIARY

[Grid for title of fiduciary]

MAILING ADDRESS OF FIDUCIARY

CITY/TOWN/POST OFFICE

STATE

ZIP + 4

[Grid for mailing address]

C/O

[Grid for C/O]

Company account number

[Grid for company account number]

Date entity created

MMDDYYYY

Fill in all that apply:

- Decedent's estate, Simple trust, Complex trust, Bankruptcy estate - ch 7, Bankruptcy estate - ch 11, Guardianship/conservatorship, Qualified funeral trust, Qualified settlement fund, ESBT, Initial return, Amended return (see instr.), Amended return due to IRS BBA partnership audit, Amended return due to federal change, Final return, Change in trust's name, Change in fiduciary, Change in fiduciary's name, Change in fiduciary's address, Nonresident beneficiaries listed on return, Resident estate or trust, Nonresident estate or trust, Enclosing Schedule DRE, Fiduciary Schedule TDS (see instr.), Enclosing Schedule FCI, Member of a lower-tier entity

Number of employees in Massachusetts [Grid]

Number of employees worldwide [Grid]

Annual Voluntary Election- Pass-through entity has elected to pay tax at the entity level pursuant to MGL ch 63D (this election is irrevocable) [Radio]

Total amount paid [Grid]

PART B INCOME

Table with 6 rows: 1 Wages, salaries, tips and other employee compensation; 2 Taxable pensions and annuities; 3 Business/profession or farm income or loss; 4 Rental, royalty and REMIC income or loss; 5 Total Part B 5.0% interest from Massachusetts banks; 6 Other Part B 5.0% income. Includes checkboxes for loss and amount grids.

DECLARATION. Under penalties of perjury, I declare that to the best of my knowledge and belief this return and enclosures are true, correct and complete.

Signature and preparer information section including fields for Signature of Fiduciary, Date, Print Paid Preparer's Name, Paid Preparer's PTIN, Title, Date, Paid Preparer's Phone, Paid Preparer's EIN, May DOR discuss this return with the preparer?, Paid Preparer's Signature, Date, Is Paid Preparer Self-Employed?, Name of Designated Tax Matters Partner, Identifying Number of Tax Matters Partner.



NAME OF ESTATE OR TRUST

Grid for name of estate or trust

ESTATE OR TRUST EMPLOYER IDENTIFICATION NUMBER

Grid for employer identification number

Table with 3 columns: Line number, Description, and Amount. Includes sections for Part A Interest and Dividend Income, Part A 8.5% Capital Gains, and Part C 5.0% Capital Gains.

