NCDOR | 2019 D-407

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Use		
Use Only		

7-19 Estates and Trusts Incor	ne lax Return only			
For calendar year 2019 , or fiscal year beginning (MM-DD)	and ending	Fill in all applicable circles: Initial Return		
Name of Estate or Trust (Legal Name) (USE CAPITAL LETTERS FOR NAME AND ADDRESS)				
Name of Fiduciary (Circle one): Administrator Executor Other	Federal Employer ID Number	Entity has Nonresident Beneficiaries		
Address	Apartment Number	Qualified Funeral Trust		
		If estate return, was		
City State Zip Co	ode County (Enter first five le	the tax year?		
N.C. Education Endowment Funds Vou may contribute to the N.C. Education E	Endowment Fund by making a contribution or	_ O Yes O No		
N.C. Education Endowment Fund: You may contribute to the N.C. Education E your overpayment to the Fund. To make a contribution, enclose Form NC-EDU and To designate your overpayment to the Fund, enter the amount of your designation of the fund.	your payment of \$	0 0		
Federal Extension Was the entity granted an automatic extension to file its				
1. Federal taxable income (See instructions) If amount income on Line				
2. Additions to income (From Schedule B, Fiduciary Column, Line 4) 5, 6, 0 nega fill in c	pr 7 is titive 2.	,		
3. Add Lines 1 and 2	3. O	,		
4. Deductions from income (From Schedule B, Fiduciary Column, Line 5)	4.	,		
5. Line 3 minus Line 4	5. 0	,		
6. Income not taxable to North Carolina (See instructions)	6. 0			
7. North Carolina taxable income (Line 5 minus Line 6)	7. 0	,		
8. Tax - To calculate the tax, multiply North Carolina taxable income on Line 7 by 5.25% (0.0525)	▶ 8.	,		
9. Tax credits (From Form D-407TC, Line 13)	2 0 ▶ 9.	,		
10. Tax paid with extension	6 0 ► 10.	,		
11. Other prepayments of tax	▶ 11.	,		
12. Tax paid by partnerships or S Corporations and North Carolina tax withheld reported on Form 1099R (See instructions)	▶ 12.	,		
13. Total tax credits and payments (Add Lines 9 - 12)	13.			
14. Tax Due - If Line 8 is more than Line 13, subtract and enter the result	■ ▶ 14.			
15. 15a. Penalties 15 b. Interest	dd Lines 15a and			
00 00 15	5b and enter the 15c. stal on Line 15c)	,		
16. Add Lines 14 and 15c and enter the total - Pay this Amount	16. \$,		
17. If Line 8 is less than Line 13, subtract and enter the Overpayment	17.	,		
18. Contribution to the N. C. Nongame and Endangered Wildlife Fund ▶ 18.				
19. Contribution of overpayment to the N. C. Education Endowment Fun	nd ▶ 19.	,		
20 . Add Lines 18 and 19	,			
21. Subtract Line 20 from Line 17 and enter the Amount to be Refunded	▶ 21.			

D-407 Web 7-19					
Estate Information:	Trust Information:				
Date of Decedent's Death	Name and Address				
If no return filed last year, reason why	of Grantor				
leason wily	If no return filed last year,				
	reason why				
Schedule A. North Carolina Fiduciary Adjustments (See instru					
 Interest income from obligations of states other than North Carolina State, local, or foreign income taxes deducted on the federal return Adjustment for bonus depreciation (See instructions) Other additions to income (See instructions) Total additions to income (Add Lines 1 - 4) 	.00				
9 3. Adjustment for bonus depreciation (See instructions)	100				
4. Other additions to income (See instructions)	.00				
5. Total additions to income (<i>Add Lines 1 - 4</i>)	.00				
Apportion the additions on Line 5 between the beneficiaries and the fidu	ciary on Schedule B, Line 4 below				
6. Interest income from obligations of the United States or United States	s' pos <mark>sessions</mark> 6.				
7. Taxable portion of Social Security and Railroad Retirement benefits	7				
8. Retirement benefits received from vested N. C. State government, N. or federal government retirees (Bailey Settlement – Important: See I.					
9. State, local, or foreign income tax refunds reported as income on fed					
10. Adjustment for bonus depreciation added back in 2014, 2015, 2016,					
10a. 2014 10b. 2015 10c. 2016	10d. 2017 10e. 2018				
8. Retirement benefits received from vested N. C. State government, N. or federal government retirees (<i>Bailey Settlement – Important: See I.</i> 9. State, local, or foreign income tax refunds reported as income on fed 10. Adjustment for bonus depreciation added back in 2014, 2015, 2016, 10a. 2014 10b. 2015 10c. 2016 (Add Lines 10a, 10b, 10c, 10d, and 10e, and enter total on Line 10f)	.0000				
(Add Lines 10a, 10b, 10c, 10d, and 10e, and enter total on Line 10f)					
11. Other deductions from income (See instructions)	1100				
12. Total deductions from income (Add Lines 6 - 9, 10f, and 11) Apportion the deductions on Line 12 between the beneficiaries and the fiduciary on Schedule B, Line 5 below 12.					
Schedule B. Apportionment of Income and Adjustments (See instr	uctions) Important: If more than three beneficiaries, include separate schedule for additional beneficiaries.				
Attach other pages if needed. Fiduciary Beneficia	ary 1 Beneficiary 2 Beneficiary 3				
1. Identifying Number					
2. Name					
3. Net N.C. Source Income					
4. Additions					
5. Deductions					
Important: The fiduciary must provide each beneficiary an NC K-1 for Form D-407 or other information necessary for the beneficiary to prepare the appropriate North Carolina Income Tax Return.					
I declare and certify that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete.					
Contact Phone Number (Include area code)					
Signature of Fiduciary Representing Estate or Trust Date Check here if you authorize the North Carolina Department of Revo	enue to discuss this return and attachments with the paid preparer below.				
If prepared by a person other than fiduciary, this certification is based on all information of	which the preparer has any knowledge.				
Signature of Preparer Other Than Fiduciary Date	Preparer's Contact Phone Number				
Ta H w	(Include area code)				
Address MAIL TO: NC Department of Revenue, P.O. Box 25000, Raleigh, NC 27640-0640					

Federal Employer ID Number

Page 2

Legal Name (First 10 Characters)