



# OKLAHOMA NONRESIDENT FIDUCIARY RETURN OF INCOME

|                          |   |
|--------------------------|---|
| Name of estate or trust: | Federal Employer Identification Number: |
|--------------------------|---|

|    |  | <b>Column B</b><br>Oklahoma Amount |
|----|--|------------------------------------|
| 26 | Taxable income of fiduciary (Amount shown on line 25, Column B).....   | 00                                 |
| 27 | Tax on amount on line 26 (from tax table - see instructions) <b>(this is your base tax)</b> .....  | 00                                 |
| 28 | Oklahoma percentage (enter percentage from line 20).....   | %                                  |
| 29 | Multiply line 27 by line 28 <b>(this is your Oklahoma state income tax)</b><br>If an ESBT or Charitable Trust, see the instructions and enter "1" 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..... | 00                                 |
| 30 | Credits: Enter number in box for type of credit. Provide Form 511CR. (See instructions) ...  | 00                                 |
| 31 | Balance of tax due (subtract line 30 from line 29, but not less than zero).....  | 00                                 |
| 32 | 2018 Okla. estimated tax payments (i.e. Form(s) OW-8-ESC) .....  | 00                                 |
| 33 | Amount paid with extension request.....  | 00                                 |
| 34 | Oklahoma Withholding (provide Form 1099, 500-B or other withholding statement) ....  | 00                                 |
| 35 | Refundable Credits from Form .....a) <input type="checkbox"/> 577..... b) <input type="checkbox"/> 578 .....   | 00                                 |
| 36 | Amount paid with original return and amount paid after it was filed (amended return only) .....  | 00                                 |
| 37 | Any refunds or overpayment applied (amended return only) .....   | 00                                 |
| 38 | Total of lines 32 through 37 .....   | 00                                 |
| 39 | If line 38 is larger than line 31, enter amount <b>overpaid</b> .....  | 00                                 |
| 40 | Amount of line 39 to be credited to 2019 estimated tax (original return only) ...  | 00                                 |
| 41 | Amount of line 39 to be refunded to you..... <b>Refund</b> →   | 00                                 |

**Want a Faster Refund?** → Is this refund going to or through an account that is located outside of the United States?  Yes  No

Elect to have your refund directly deposited into your checking or savings account. Deposit my refund in my:  checking account  savings account

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

Routing Number:

Account Number:

|    |  |                      |                          |    |
|----|--|----------------------|--------------------------|----|
| 42 | If line 31 is larger than line 38 enter tax due .....          | <b>Tax Due</b> →     | 42                       | 00 |
| 43 | Underpayment of estimated tax interest.....                    | Annualized           | <input type="checkbox"/> | 43 |
| 44 | For delinquent payment, add penalty of 5%.....\$               | plus                 |                          | 00 |
|    | interest at 1.25% per month .....                              | \$                   | 44                       | 00 |
| 45 | Total tax, penalty and interest (add lines 42, 43 and 44)..... | <b>Balance Due</b> → | 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' here**

Make check payable to the Oklahoma Tax Commission

Under 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 |  |

|  |   |             |
|--|---|-------------|
| <b>Form 513NR - page 3</b><br><b>Oklahoma</b><br><b>Schedule K-1</b> | <b>PART 2: BENEFICIARY'S SHARE OF</b><br><b>INCOME AND DEDUCTIONS</b> | <b>2018</b> |
|--|---|-------------|

|   |  |
|---|--|
| For calendar year 2018 or fiscal year beginning _____, 2018<br>and ending _____, _____. | <input type="checkbox"/> Amended K-1<br><input type="checkbox"/> Final K-1<br><input type="checkbox"/> 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                          |

| <b>Income</b> |  | 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, municipal interest .....  | 6       |          |
| 7             | U.S. interest.....   | 7       |          |

| <b>Deductions</b> |  |     |  |
|-------------------|--|-----|--|
| 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. _____   | 13f |  |
|                   | g. _____   | 13g |  |

