



2013

**Massachusetts**  
**Department of**  
**Revenue**

# Schedule 2K-1

## Beneficiary's Massachusetts Information

Name of estate or trust	Estate or trust employer identification		
Name of beneficiary	Legal domicile of beneficiary (state)	Beneficiary's identification number	
Mailing address of beneficiary	City/Town	State	Zip
Name of fiduciary			
Mailing address of fiduciary	City/Town	State	Zip
In care of address	City/Town	State	Zip

Check if: ☐ Amended 2K-1 ☐ Final 2K-1 Beneficiary's percentage of taxable income \_\_\_\_\_

What type of entity is this beneficiary? ☐ Individual ☐ Estate/trust ☐ Charitable organization ☐ Other

Is this beneficiary a nonresident of Massachusetts? ☐ Yes ☐ No

**Allocable share item****Part B income**

	a. Amount from federal 1041 allocable to this beneficiary	b. Massachusetts adjustments	c. Total amounts using Mass- achusetts law (see instructions)	d. Massachusetts source income (see instructions)
<b>1</b> Wages, salaries, tips and other employee compensation . . . <b>1</b>				
<b>2</b> Taxable pensions and annuities . . . . . <b>2</b>				
<b>3</b> Business/profession or farm income or loss. . . . . <b>3</b>				
<b>4</b> Rental, royalty and REMIC income or loss. . . . . <b>4</b>				
<b>5</b> Massachusetts bank interest. . . . . <b>5</b>				
<b>6</b> Other income, such as winnings, lump-sum distributions, etc. (itemize) . . . . . <b>6</b>				
<b>7</b> Deductions allowed decedents . . . . . <b>7</b>				

**Part A interest and dividend income**

<b>8</b> Interest and dividend income (do not include income from common trust funds) . . . . . <b>8</b>				
<b>9</b> Common trust fund interest and dividend income . . . . . <b>9</b>				

**Part A capital gains**

<b>10</b> Taxable Part A 12% capital gains (do not include income from common trust funds). . . . . <b>10</b>				
<b>11</b> Part A 12% short-term common trust fund capital gains . . . <b>11</b>				

**Part C capital gains**

<b>12</b> Part C 5.25% long-term capital gains (do not include income from common trust funds) . . . . . <b>12</b>				
<b>13</b> Part C 5.25% long-term common trust fund capital gains. . . <b>13</b>				

**Credits and Estimated Tax Payments**

<b>14</b>	Taxes paid to other jurisdictions . . . . .	<b>14</b>				
<b>15</b>	Lead Paint. . . . .	<b>15</b>				
<b>16a</b>	Economic Opportunity Area . . . . .	<b>16a</b>				
<b>16b</b>	Economic Development Incentive Program. Certificate number _____	<b>16b</b>				
<b>17</b>	Brownfields. Certificate number _____	<b>17</b>				
<b>18</b>	Low-Income Housing. Certificate number _____	<b>18</b>				
<b>19</b>	Historic Rehabilitation. Certificate number _____	<b>19</b>				
<b>20</b>	Film Incentive. Certificate number _____	<b>20</b>				
<b>21</b>	Medical Device. Certificate number _____	<b>21</b>				
<b>22</b>	Employer Wellness Program. Certificate number _____	<b>22</b>				
<b>23</b>	Estimated tax payments made on behalf of nonresident beneficiary by fiduciary . . . . .	<b>23</b>				
<b>24</b>	Refundable Film Credit. . . . .	<b>24</b>				
<b>25</b>	Refundable Dairy Credit. Certificate number _____	<b>25</b>				
<b>26</b>	Refundable Conservation Tax Credit. Certificate number _____	<b>26</b>				
<b>27</b>	Other payments (see instructions) . . . . .	<b>27</b>				