



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

| | a. Amount from federal 1041 allocable to this beneficiary | b. Massachusetts adjustments | c. Total amounts using Massachusetts law (see instructions) | d. Massachusetts source income (see instructions) |
|---|---|------------------------------|---|---|
| Allocable share item | | | | |
| Part B income | | | | |
| 1 Wages, salaries, tips and other employee compensation . . . 1 | | | | |
| 2 Taxable pensions and annuities 2 | | | | |
| 3 Business/profession or farm income or loss. 3 | | | | |
| 4 Rental, royalty and REMIC income or loss. 4 | | | | |
| 5 Massachusetts bank interest. 5 | | | | |
| 6 Other income, such as winnings, lump-sum distributions, etc. (itemize) 6 | | | | |
| 7 Deductions allowed decedents 7 | | | | |
| Part A interest and dividend income | | | | |
| 8 Interest and dividend income (do not include income from common trust funds) 8 | | | | |
| 9 Common trust fund interest and dividend income 9 | | | | |
| Part A capital gains | | | | |
| 10 Taxable Part A 12% capital gains (do not include income from common trust funds). 10 | | | | |
| 11 Part A 12% short-term common trust fund capital gains . . . 11 | | | | |
| Part C capital gains | | | | |
| 12 Part C 5.2% long-term capital gains (do not include income from common trust funds) 12 | | | | |
| 13 Part C 5.2% long-term common trust fund capital gains . . . 13 | | | | |

Credits and Estimated Tax Payments

| | | | | | | |
|------------|--|------------|--|--|--|--|
| 14 | Taxes paid to other jurisdictions | 14 | | | | |
| 15 | Lead Paint. | 15 | | | | |
| 16a | Economic Opportunity Area | 16a | | | | |
| 16b | Economic Development Incentive Program. Certificate number _____ | 16b | | | | |
| 17 | Brownfields. Certificate number _____ | 17 | | | | |
| 18 | Low-Income Housing. Certificate number _____ | 18 | | | | |
| 19 | Historic Rehabilitation. Certificate number _____ | 19 | | | | |
| 20 | Film Incentive. Certificate number _____ | 20 | | | | |
| 21 | Medical Device. Certificate number _____ | 21 | | | | |
| 22 | Employer Wellness Program. Certificate number _____ | 22 | | | | |
| 23 | Estimated tax payments made on behalf of nonresident beneficiary by fiduciary | 23 | | | | |
| 24 | Refundable Film Credit. | 24 | | | | |
| 25 | Refundable Dairy Credit. Certificate number _____ | 25 | | | | |
| 26 | Refundable Conservation Tax Credit. Certificate number _____ | 26 | | | | |
| 27 | Refundable Community Investment Tax Credit. Certificate number _____ | 27 | | | | |
| 28 | Other payments (see instructions) | 28 | | | | |