



Massachusetts Department of Revenue
Schedule 2K-1
Beneficiary's Massachusetts Information

2016

Name of estate or trust		Estate or trust employer Identification number
Name of beneficiary	Legal domicile (state) of beneficiary	Identification number of beneficiary
Street address		
City/Town	State	Zip
Name of fiduciary		
Street address		
City/Town	State	Zip
In/care/of address		
City/Town	State	Zip
Fill in one only: ☐ Amended 2K-1 ☐ Final 2K-1		Percentage of beneficiary's taxable income
What type of entity is beneficiary? ☐ Individual ☐ Estate/trust ☐ Charitable organization ☐ Other		Fill in if beneficiary is a nonresident of Mass. ☐

Allocable share item

	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)
Part B income				
▼ Fill in oval if showing a loss				
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 5.1% long-term capital gains (do not include income from common trust funds) 12				
13 Part C 5.1% long-term common trust fund capital gains. . . 13				



Name of estate or trust

Estate or trust employer Identification number

Allocable share item (cont'd/)

	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)
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 16b				
Certificate number				
17 Brownfields. 17				
Certificate number				
18 Low-Income Housing 18				
Building Identification number				
19 Historic Rehabilitation 19				
Certificate number				
20 Film Incentive 20				
Certificate number				
21 Medical Device. 21				
Certificate number				
22 Employer Wellness Program 22				
Certificate number				
23 Farming and Fisheries 23				
24 Senior Circuit Breaker 24				
25 Solar/Wind 25				
26 Septic 26				
27 Certified Housing Development. 27				
Certificate number				
28 Life Science Company. 28				
29 Estimated tax payments made on behalf of nonresident beneficiary by fiduciary. 29				
30 Refundable Film Credit 30				
31 Refundable Dairy Credit. 31				
Certificate number				
32 Refundable Conservation Tax Credit. 32				
Certificate number				
33 Refundable Community Investment Tax Credit. 33				
Certificate number				
34 Other payments (see instructions). 34				