



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

2017

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)
▼ 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 Veterans Hire	29				
Certificate number					
30 Low-Income Housing Donation	30				
Certificate number					
31 Estimated tax payments made on behalf of nonresident beneficiary by fiduciary.	31				
32 Refundable Film.	32				
33 Refundable Dairy	33				
Certificate number					
34 Refundable Conservation	34				
Certificate number					
35 Refundable Community Investment.	35				
Certificate number					
36 Other payments (see instructions).	36				