



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

2020

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:		Percentage of beneficiary's taxable income	
<input type="radio"/> Amended 2K-1 <input type="radio"/> Final 2K-1			
What type of entity is beneficiary?			Fill in if beneficiary is a nonresident of Mass.
<input type="radio"/> Individual <input type="radio"/> Estate/trust <input type="radio"/> Charitable organization <input type="radio"/> Other			<input type="radio"/>

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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4 Rental, royalty and REMIC income or loss	4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5 Massachusetts bank interest	5			
6 Other income, such as winnings, lump-sum distributions, etc. (itemize)	6	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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 5.0% long-term capital gains (do not include income from common trust funds)	12			
13 Part C 5.0% long-term common trust fund capital gains	13			



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Allocable share item (cont'd.)

		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)
Credits and estimated tax payments					
14 Taxes paid to other jurisdictions	14	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
15 Lead Paint	15	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
16a Economic Opportunity Area	16a	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
16b Economic Development Incentive Program	16b	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
17 Brownfields	17	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
18 Low-Income Housing	18	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Building Identification number		<input type="text"/>			
19 Historic Rehabilitation	19	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
20 Film Incentive	20	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
21 Medical Device	21	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
22 Employer Wellness Program	22	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
23 Farming and Fisheries	23	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
24 Senior Circuit Breaker	24	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
25 Solar/Wind	25	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
26 Septic	26	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
27 Certified Housing Development	27	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
28 Life Sciences	28	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
29 Veterans Hire	29	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
30 Low-Income Housing Donation	30	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
31 Angel Investor	31	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
32 Apprentice	32	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			
33 Vacant Store Front	33	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>			



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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 (cont'd.)				
34 Estimated tax payments made on behalf of nonresident beneficiary by fiduciary	34	<input type="text"/>	<input type="text"/>	<input type="text"/>
35 Refundable Film	35	<input type="text"/>	<input type="text"/>	<input type="text"/>
36 Refundable Dairy	36	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>		
37 Refundable Conservation.	37	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>		
38 Refundable Community Investment	38	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificate number		<input type="text"/>		
39 Other payments (see instructions)	39	<input type="text"/>	<input type="text"/>	<input type="text"/>