



ALABAMA DEPARTMENT OF REVENUE
Fiduciary Income Tax Beneficiary Information

Tax year beginning _____, 2023 and ending _____, 20____

Information about the Beneficiary

BENEFICIARY'S IDENTIFYING NUMBER
●

NAME
●

STREET ADDRESS
●

CITY STATE ZIP
● ● ●

WHAT TYPE OF ENTITY IS THIS BENEFICIARY
●

Alabama resident Nonresident

Beneficiary's percentage of allocated income ●

Information about the Estate or Trust

ESTATE'S OR TRUST'S EMPLOYER IDENTIFICATION NUMBER

ESTATE'S OR TRUST'S NAME

STREET ADDRESS

CITY STATE ZIP

FIDUCIARY'S NAME

Beneficiary's Share of Current Year Alabama Income, Deductions, and Other Items

	(a) Alabama Distributable Income	(b) Nonresident Non-Alabama Source Income	(c) Reportable Alabama Income
1 Interest income 1	●	●	●
2 Dividend income 2	●	●	●
3 Capital gain or (loss) 3	●	●	●
4 Business income or (loss) 4	●	●	●
5a Rent, royalties, partnerships and S corporations 5a	●	●	●
5b Estates and Trusts 5b	●	●	●
6 Farm income or (loss) 6	●	●	●
7 Ordinary gain or (loss) from Form 4797 7	●	●	●
8 Other income 8	●	●	●
9 RESERVED FOR FUTURE USE			
10 RESERVED FOR FUTURE USE			
11 Alabama Exempt Income 11	●		●

Directly Apportioned Deductions/Credits

12 Depreciation 12	●
13 Depletion 13	●
14 Amortization 14	●
15 Composite/Electing Pass-Through Credit 15	●

Credits from Schedule FC

	Code	Maximum Allowable
16a	●	●
16b	●	●
16c	●	●