



ALABAMA DEPARTMENT OF REVENUE
Fiduciary Income Tax Beneficiary Information

Tax year beginning _____, 2024 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 •16a		
16b •16b		
16c •16c		