



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 . . . . .	●	●