

D-407

2020 ESTATES AND TRUSTS INCOME TAX RETURN (REVISION 8-13-20)

CHANGES FOR THE YEAR

- Barcode, revision date and tax year references updated.
- NOTE:** to avoid a resubmission request for the incorrect variety of test samples, make sure to submit test samples with negative values on Lines 1 and 6 for Form D-407, including the full field.

Production Details:

Approved By Date:	November 23, 2020
Form Period Date Effective:	Calendar Year December 31, 2020; Fiscal Year November 30, 2021
For Filing Periods	December 2020 and later
Form Placed in Software:	After December 31, 2020
Unchanged/Updated:	Updated

9-12 TEST SAMPLES REQUIRED:

- 1 Blank
- 1 Full Field
- 7 by PDF or 10 by Mail which must include the following:
 - 1 Test sample with negative values on line 1 and 6

Note: This form is part of a set; all forms in the set require approval.

BARCODE:

The barcode must read 71201XX022. Replace (XX) with your two-digit Software Developer Identification Number.

Align barcode between Row 30, Column 75-79 and Row 45, Column 75-79. Print the number above the barcode.

USE:

- 12 point Courier font for scanband
- All capital letters for variable data
- Correct barcode length
- Hard coded year "20" for the tax year - including blank copy
- High Resolution Bitmap for barcodes
- Matching line geometry
- No punctuation or special characters in address field
- Prefixes of 999, 900, 000 or 666 for FEINs/SSNs
- Proper format when data of paid preparer ID and telephone number flows into scan band
- Various Entity ID numbers

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
9	Fiscal Year Beginning	45	8	52	Numeric; No Punctuation Starting Date. Ex. 03 01 20 20 must be hard coded
9	And Ending	65	8	72	Numeric; No Punctuation Ending Date. Ex. 02 29 21
29	Legal Name	6	4	9	Alphanumeric 1 st four characters of legal name
29	Address	13	4	16	Alphanumeric; 1 st four characters of address
29	Zip Code	20	5	24	Numeric; 5-digit zip code
29	Initial Return	28	2	29	IR
29	Initial Return	32	1	32	Alpha; Y or N Y: Yes N: No
29	Amended Return	36	2	37	AR
29	Amended Return	40	1	40	Alpha; Y or N Y: Yes N: No
29	Final Return	44	2	45	FR
29	Final Return	48	1	48	Alpha; Y or N Y: Yes N: No
29	NR Beneficiaries	52	3	54	NRB
29	NR Beneficiaries	57	1	57	Alpha; Y or N Y: Yes N: No
29	Qualified Funeral Trust	61	3	63	QFT
29	Qualified Funeral Trust	66	1	66	Alpha; Y or N Y: Yes N: No
31	Name of Estate or Trust	6	40	45	Alphanumeric
31	FEIN	49	9	57	Numeric; No dashes Print number consecutively
31	Final Distribution of Assets	61	3	63	FDA
31	Final Distribution Assets	68	1	68	Alpha; Y or N Y: Yes N: No

33	Name of Estate or Trust	6	40	45	Alphanumeric
33	Federal Extension	61	5	65	Alpha
33	FDEXT	68	1	68	Alpha: Y or N Y: Yes N: No
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35	Address	6	31	36	Alphanumeric
35	Apartment Number	39	5	43	Alphanumeric
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37	City	6	18	23	Alpha
37	State	26	2	27	Alpha
37	Zip Code	30	10	39	Numeric; Print 9-digit zip code Add (-) before 4 digit zip code
37	Line 15A	52	3	54	15A
37	Line 15A	62	6	67	Numeric
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39	Line 01	6	2	7	01
39	Line 01	11	11	21	Numeric; "-"
39	Line 09	29	2	30	09
39	Line 09	35	10	44	Numeric
39	Line 15B	52	3	54	15B
39	Line 15B	62	6	67	Numeric
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41	Line 02	6	2	7	02
41	Line 02	12	10	21	Numeric
41	Line 10	29	2	30	10
41	Line 10	35	10	44	Numeric
41	Line 16	52	2	53	16
41	Line 16	58	10	67	Numeric
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43	Line 04	6	2	7	04
43	Line 04	12	10	21	Numeric
43	Line 11	29	2	30	11
43	Line 11	35	10	44	Numeric
43	Line 18	52	2	53	18
43	Line 18	58	10	67	Numeric

45	Line 06	6	2	7	06
45	Line 06	11	11	21	Numeric; "-"
45	Line 12	29	2	30	12
45	Line 12	35	10	44	Numeric
45	Line 19	52	2	53	19
45	Line 19	60	8	67	Numeric
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47	Line 08	6	2	7	08
47	Line 08	12	10	21	Numeric
47	Line 14	29	2	30	14
47	Line 14	35	10	44	Numeric
47	Line 21	52	2	53	21
47	Line 21	58	10	67	Numeric