2010

**Massachusetts Department of Revenue**

# Schedule 2K-1
# Beneficiary's Massachusetts Information

| Name of estate or trust | | Estate or trust employer identification | |
|---|---|---|---|
| Name of beneficiary | Legal domicile of beneficiary (state) | Beneficiary's identification number | |
| Mailing address of beneficiary | City/Town | State | Zip |
| Name of fiduciary | | | |
| Mailing address of fiduciary | City/Town | State | Zip |
| In care of address | City/Town | State | Zip |

Check if: ☐ Amended 2K-1 ☐ Final 2K-1 Beneficiary's percentage of taxable income _____

What type of entity is this beneficiary? ☐ Individual ☐ Estate/trust ☐ Charitable organization ☐ Other

Is this beneficiary a nonresident of Massachusetts? ☐ Yes ☐ No

| **Allocable share item** | | **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) |
|---|---|---|---|---|---|
| **Part B income** | | | | | |
| **1** Wages, salaries, tips and other employee compensation | **1** | | | | |
| **2** Taxable pensions and annuities | **2** | | | | |
| **3** Business/profession or farm income or loss | **3** | | | | |
| **4** Rental, royalty and REMIC income or loss | **4** | | | | |
| **5** Massachusetts bank interest | **5** | | | | |
| **6** Other income, such as winnings, lump-sum distributions, etc. (itemize) | **6** | | | | |
| **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 5.3% long-term capital gains (do not include income from common trust funds) | **12** | | | | |
| **13** Part C 5.3% long-term common trust fund capital gains | **13** | | | | |

**Credits and Estimated Tax Payments**

| | | | | | |
|---|---|---|---|---|---|
| **14** | Taxes paid to other jurisdictions | **14** | | | | |
| **15** | Lead Paint | **15** | | | | |
| **16** | Economic Opportunity Area | **16** | | | | |
| **17** | Brownfields.<br>Certificate number _____ | **17** | | | | |
| **18** | Low-Income Housing.<br>Certificate number _____ | **18** | | | | |
| **19** | Historic Rehabilitation.<br>Certificate number _____ | **19** | | | | |
| **20** | Film Incentive.<br>Certificate number _____ | **20** | | | | |
| **21** | Medical Device.<br>Certificate number _____ | **21** | | | | |
| **22** | Estimated tax payments made on behalf of nonresident beneficiary by fiduciary | **22** | | | | |
| **23** | Refundable Film Credit | **23** | | | | |
| **24** | Refundable Dairy Credit.<br>Certificate number _____ | **24** | | | | |
| **25** | Other payments (see instructions) | **25** | | | | |