Massachusetts Department of Revenue

Schedule 2K-1
Beneficiary's Massachusetts Information 2017

Name of estate or trust | Estate or trust employer Identification number

Name of beneficiary | Legal domicile (state) of beneficiary | Identification number of beneficiary

Street address

City/Town | State | Zip

Name of fiduciary

Street address

City/Town | State | Zip

In/care/of address

City/Town | State | Zip

Fill in one only: ◯ Amended 2K-1 ◯ Final 2K-1 | Percentage of beneficiary's taxable income

What type of entity is beneficiary? ◯ Individual ◯ Estate/trust ◯ Charitable organization ◯ Other | Fill in if beneficiary is a nonresident of Mass. ◯

Allocable share item	a. Amount from federal 1041 allocable to this beneficiary	b. Massachusetts adjustments	c. Total amounts using Mass-achusetts law (see instructions)	d. Massachusetts source income (see instructions)
Part B income	▼ Fill in oval if showing a loss			
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 5.1% long-term capital gains (do not include income from common trust funds) **12**				
13 Part C 5.1% long-term common trust fund capital gains. . . . **13**				

Name of estate or trust | Estate or trust employer Identification number

Allocable share item (cont'd/)

	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)
Credits and estimated tax payments				
14 Taxes paid to other jurisdictions **14**				
15 Lead Paint **15**				
16a Economic Opportunity Area **16a**				
16b Economic Development Incentive Program **16b** Certificate number				
17 Brownfields **17** Certificate number				
18 Low-Income Housing **18** Building Identification number				
19 Historic Rehabilitation **19** Certificate number				
20 Film Incentive **20** Certificate number				
21 Medical Device **21** Certificate number				
22 Employer Wellness Program **22** Certificate number				
23 Farming and Fisheries **23**				
24 Senior Circuit Breaker **24**				
25 Solar/Wind **25**				
26 Septic **26**				
27 Certified Housing Development **27** Certificate number				
28 Life Science Company **28**				
29 Veterans Hire **29** Certificate number				
30 Low-Income Housing Donation **30** Certificate number				
31 Estimated tax payments made on behalf of nonresident beneficiary by fiduciary **31**				
32 Refundable Film **32**				
33 Refundable Dairy **33** Certificate number				
34 Refundable Conservation **34** Certificate number				
35 Refundable Community Investment **35** Certificate number				
36 Other payments (see instructions) **36**				