AREA RESERVED
FOR 2-D BARCODE

2017 Schedule B

XXXXXXXXXXXXX

Interest, Dividends and Certain Capital Gains and Losses

NAMEOFESTATEORTRUSTXXXXXXXXXXXXXXXXX ESTTRIDNOXX

1.	Total interest (from U.S. Form 1041, line 1; or Form 1041-QFT, line 1a)	**1**	XXXXXXXXXXXX
2.	Total dividends (from U.S. Form 1041, line 2a; or Form 1041-QFT, line 2a)	**2**	XXXXXXXXXXXX
3.	Other interest and dividends not included above	**3**	XXXXXXXXXXXX
4.	Total interest and dividends. Add lines 1 through 3	**4**	XXXXXXXXXXXX
5.	Interest on U.S. debt obligations included in line 4	**5**	XXXXXXXXXXXX
6.	Interest from Massachusetts banks reported in Form 2, line 5 (5.1% income)	**6**	XXXXXXXXXXXX
7.	Other exclusions (see instructions). Attach list of exclusions, if any	**7**	XXXXXXXXXXXX
8.	Total adjustments. Add lines 5 through 7	**8**	XXXXXXXXXXXX
9.	Subtotal. Subtract line 8 from line 4	**9**	XXXXXXXXXXXX
10.	Allowable deductions from your trade or business (from Massachusetts Schedule C-2)	**10**	XXXXXXXXXXXX
11.	Subtotal. Subtract line 10 from line 9	**11**	XXXXXXXXXXXX
12.	Short-term capital gains (included in U.S. Form 1041, Schedule D, Part I, lines 1 through 5)	**12**	XXXXXXXXXXXX
13.	Long-term capital gains on collectibles and pre-1996 installment sales (from Massachusetts Schedule D, line 11)	**13**	XXXXXXXXXXXX
14.	Gain on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	**14**	XXXXXXXXXXXX
15.	Add lines 12 through 14	**15**	XXXXXXXXXXXX
16.	Allowable deductions from your trade or business (from Massachusetts Schedule C-2)	**16**	XXXXXXXXXXXX
17.	Subtotal. Subtract line 16 from line 15	**17**	XXXXXXXXXXXX
18.	Short-term capital losses (included in U.S. Form 1041, Schedule D, Part I, lines 1 through 5)	**18**	−XXXXXXXXXXX
19.	Loss on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	**19**	−XXXXXXXXXXX
20.	Prior short-term losses for years beginning after 1981 (from 2016 Massachusetts Schedule B, line 41)	**20**	−XXXXXXXXXXX
21.	Combine lines 17 through 20. If a positive amount, go to line 26. If the total is a loss, go to line 22	**21**	−XXXXXXXXXXX
22.	Short-term capital losses applied against interest and dividends. Enter the smaller of line 11 or line 21 (as a positive amount). Not more than $2,000	**22**	XXXXXXXXXXXX
23.	Subtotal. Combine lines 21 and 22	**23**	−XXXXXXXXXXX
24.	Short-term capital losses applied against long-term capital gains	**24**	XXXXXXXXXXXX
25.	Short-term losses available for carryover in 2018. Combine lines 23 and 24 and enter result here and in line 41, omit lines 26 through 29, enter “0” in line 30, and complete lines 31 through 40	**25**	−XXXXXXXXXXX
26.	Short-term gains and long-term gains on collectibles. Enter amount from line 21. See instructions	**26**	XXXXXXXXXXXX
27.	Long-term capital losses applied against short-term capital gains	**27**	XXXXXXXXXXXX
28.	Subtotal. Subtract line 27 from line 26. Enter result here. If line 28 is “0,” omit line 29, and enter “0” in line 30	**28**	XXXXXXXXXXXX
29.	Long-term gains deduction. Complete only if lines 13 and 28 are greater than “0.” If line 13 shows a gain, enter 50% of line 13 minus 50% of losses in lines 18, 19, 20 and 27, but not less than “0”	**29**	XXXXXXXXXXXX
30.	Short-term gains after long-term gains deduction. Subtract line 29 from line 28	**30**	XXXXXXXXXXXX

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XXXXXXXXXXXXX

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31.	Enter the amount from line 11	**31**	XXXXXXXXXXXX
32.	Short-term losses applied against interest and dividends. Enter the amount from line 22	**32**	XXXXXXXXXXXX
33.	Subtotal. Subtract line 32 from line 31. See instructions	**33**	XXXXXXXXXXXX
34.	Long-term losses applied against interest and dividends (from worksheet in instructions)	**34**	XXXXXXXXXXXX
35.	Adjusted interest and dividends. Subtract line 34 from line 33	**35**	XXXXXXXXXXXX
36.	Adjusted gross interest, dividends and certain capital gains and losses. Add lines 30 and 35. Not less than "0"	**36**	XXXXXXXXXXXX
37.	Expense and fiduciary compensation deduction. Attach Schedule H	**37**	
37a.	Expense deduction	**37a**	XXXXXXXXXXXX
37b.	Fiduciary compensation	**37b**	XXXXXXXXXXXX
37c.	Total	**37c**	XXXXXXXXXXXX
38.	Taxable interest and dividends and certain capital gains. Subtract line 37 from line 36. Not less than "0"	**38**	XXXXXXXXXXXX
39.	If line 38 is greater than or equal to line 11, enter the amount from line 11 here and on Form 2, line 14. If line 38 is less than line 11, enter line 38 here and on Form 2, line 14	**39**	XXXXXXXXXXXX
40.	Taxable 12% capital gains. Subtract line 39 from line 38. Not less than "0." Enter result here and on Form 2, line 23	**40**	XXXXXXXXXXXX
41.	Available short-term losses for carryover in 2018. Enter amount from line 25 only if it is a loss	**41**	−XXXXXXXXXXXX

BE SURE TO SIGN RETURN ON PAGE 1

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