



Massachusetts Department of Revenue
Schedule 2K-1
Beneficiary's Massachusetts Information

2019

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)
▼ Fill in oval if showing a loss				
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 5.05% long-term capital gains (do not include income from common trust funds). 12				
13 Part C 5.05% long-term common trust fund capital gains. 13				



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Allocable share item (cont'd.)

		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)
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 Sciences.	28				
29 Veterans Hire.	29				
Certificate number.					
30 Low-Income Housing Donation.	30				
Certificate number.					
31 Angel Investor.	31				
32 Apprentice.	32				
Certificate number.					
33 Vacant Store Front.	33				
Certificate number.					



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Allocable share item (cont'd.)**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)****Credits and estimated tax payments** (cont'd.)**34** Estimated tax payments made on behalf of nonresident
beneficiary by fiduciary. **34**

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35 Refundable Film. **35**

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36 Refundable Dairy. **36**
Certificate number.

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37 Refundable Conservation. **37**
Certificate number.

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38 Refundable Community Investment. **38**
Certificate number.

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39 Other payments (see instructions). **39**

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