Department of the Treasury—Internal Revenue Service

U.S. Income Tax Return for Estates and Trusts

Go to www.irs.gov/Form1041 for instructions and the latest information.

2021	

OMB No. 1545-0092

A	heck a	all that apply:	For calendar year 2021 or fiscal year beginning , 2021, and er	nding	•	, 20
	Decede	ent's estate	Name of estate or trust (If a grantor type trust, see the instructions.)		yer identif	ication number
\equiv	Simple		FIRST MIDDLE LAST		SSNx	XXXXX
	116/04/16/16	ex trust	Name and title of fiduciary Authorized	D Date er	tity create	ed
	3000000 6 123	ed disability trus	I TOUGH MANAGEMENT TO BE INTO I	DAT	E O	F BIRTH
72		S portion only)	Number, street, and room or suite no. (If a P.O. box, see the instructions.)	E Nonexe	mpt charit	table and split-interest
		r type trust			check app tructions.	licable box(es).
		ptcy estate—C	1234 YOUR ADDRESS ST.			4947(a)(1). Check here
		ptcy estate—C		100		undation ▶
_		income fund	CITY / TOWN, ST 12345	22-27		4947(a)(2)
		er of Schedules	K-1 F Check X Initial return Final return Amended return		Net oper	ating loss carryback
		ed (see tions) ►	applicable boxes: Change in trust's name Change in fiduciary Change in fiduciary's	name -	Sand Street, and and a second	in fiduciary's address
_				LEAVE	BLA	
	1	Interest in			1	
	2a		nary dividends		2a	L
	b		ividends allocable to: (1) Beneficiaries (2) Estate or trust		20	E
4	3		income or (loss). Attach Schedule C (Form 1040)		3	
Ĕ	4		in or (loss). Attach Schedule D (Form 1041)		4	Α
Income	5	270/2010 TO THE REST OF THE REST	valties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 1040		5	Λ
드	6	Earl september of the American	me or (loss). Attach Schedule F (Form 1040)	eic sa sa	6	E
	7		gain or (loss). Attach Form 4797		7	-
	8	10 m	and the transport of the same		8	В
	9		ome. List type and amount	>	9	530377
100	10		Check if Form 4952 is attached		10	<u>L</u>
	11				11	A
	12	Fiduciary	fees. If only a portion is deductible under section 67(e), see instructions	portion is deductible under section 67(e), see instructions	И	
	13	and the same that the same the	e deduction (from Schedule A, line 7)		13	K
	14	Attorney,	accountant, and return preparer fees. If only a portion is deductible under secti	on 67(e),		3
2		see instru	ctions		14	
Deductions	15a	Other dec	luctions (attach schedule). See instructions for deductions allowable under section	on 67(e)	15a	
ᅙ	b	Net opera	ting loss deduction. See instructions		15b	L
Ē	16	Add lines	10 through 15b	🕨	16	E
Δ	17	Adjusted	total income or (loss). Subtract line 16 from line 9			A
	18		stribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 104	4.0	18	Α
	19	Estate tax	deduction including certain generation-skipping taxes (attach computation) .		19	2.3
	20	Qualified	business income deduction. Attach Form 8995 or 8995-A		20	E
	21		1		21	
·	22	Add lines	18 through 21	<u> ►</u>	22	B
ts	23		acome. Subtract line 22 from line 17. If a loss, see instructions		23	L
and Payments	24		(from Schedule G, Part I, line 9)		24	A
돗	25	CANADA CONTRACTOR OF A CONTRAC	ear net 965 tax liability paid from Form 965-A, Part II, column (k) (see instructions	7 TH 10 TH	25	N
Б	26		ments (from Schedule G, Part II, line 19)		26	
2	27		tax penalty. See instructions		27	K
a	28 29		If line 26 is smaller than the total of lines 24, 25, and 27, enter amount owed.		28	3
Тах	30	S. (5)	nent. If line 26 is larger than the total of lines 24, 25, and 27, enter amount overp f line 29 to be: a Credited to 2022 ► ; b Refunded		30	
-			of perjury, I declare that I have examiner this return, including accompanying schedules and statem			of my knowledge and
Sig		belief, it is true	correct, and complete. Declaration of early (other than taxpayer) is based on all information of which	h preparer h	nas any kn	owledge.
He	.0	BY:	First Middle Last XX XX >			IRS discuss this return
116	16		fiduciary or officer representing fid. Date EIN of fiduciary if a financial in	nstitution		preparer shown below? ructions. Yes No
D.	:	100	e preparer's name Preparer's signature Date	Check	if if	PTIN
Pa			AND THE SECOND S	50000	nployed	
	epar	Eirm'o no	me ► F	irm's EIN ▶	(,
US	e Oı	Firm's ac	100 PM 10	hone no.		
	_					

Sch	edule A Charitable Deduction. Don't complete for a simple trust or a pooled income fund		
1	Amounts paid or permanently set aside for charitable purposes from gross income. See instructions	1	L
2	Tax-exempt income allocable to charitable contributions. See instructions	2	E
3	Subtract line 2 from line 1	3	A
4	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable		
	purposes	4	Λ
5	Add lines 3 and 4	5	Ę
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable		
	purposes. See instructions	6	В
7	Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13	7	Ī
Sch	edule B Income Distribution Deduction	. 8	NA-3-1-2-3
1	Adjusted total income. See instructions	1	A
2	Adjusted tax-exempt interest	2	И
3	Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions	3	K
4	Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion)	4	
5	Capital gains for the tax year included on Schedule A, line 1. See instructions	5	
6	Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss as a		
	positive number	6	L
7	Distributable net income. Combine lines 1 through 6. If zero or less, enter -0	7	E
8	If a complex trust, enter accounting income for the tax year as determined		A
	under the governing instrument and applicable local law		
9	Income required to be distributed currently	9	V
10	Other amounts paid, credited, or otherwise required to be distributed	10	E
11	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions	11	
12	Enter the amount of tax-exempt income included on line 11	12	В
13	Tentative income distribution deduction. Subtract line 12 from line 11	13	I.
14	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0	14	102007F02
15	Income distribution deduction. Enter the smaller of line 13 or line 14 here and on page 1, line 18 .	15	A
Sch	edule G Tax Computation and Payments (see instructions)		N
Part l	I — Tax Computation		K
Part I	Tax:		K
-	Tax: Tax on taxable income. See instructions		K
1	Tax: Tax on taxable income. See instructions		K
1 a	Tax: Tax on taxable income. See instructions		K
1 a b	Tax: 1a Tax on taxable income. See instructions 1a Tax on lump-sum distributions. Attach Form 4972 1b B Alternative minimum tax (from Schedule I (Form 1041), line 54) 1c T Total. Add lines 1a through 1c 7	1d	K
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Other	Information	Yes	No
1	Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses.	L	L
2	Enter the amount of tax-exempt interest income and exempt-interest dividends ▶ \$ Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement?	Е	Е
3	At any time during calendar year 2021, did the estate or trust have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	A	А
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶	V	V
4	During the tax year, did the estate or trust receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," the estate or trust may have to file Form 3520. See instructions		
5	Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see the instructions for the required attachment	E	E
6 7	If this is an estate or a complex trust making the section 663(b) election, check here. See instructions		
8	If the decedent's estate has been open for more than 2 years, attach an explanation for the delay in closing the estate, and check here	В	В
9 10	Are any present or future trust beneficiaries skip persons? See instructions	L	L
11a	Did the estate or trust distribute S corporation stock for which it made a section 965(i) election?	Α	Α
b	If "Yes," did each beneficiary enter into an agreement to be liable for the net tax liability? See instructions		
12	Did the estate or trust make a section 965(i) election for S corporation stock held on the last day of the tax year? See instructions	N	N
13 14	ESBTs only. Does the ESBT have a nonresident alien grantor? If "Yes," see instructions	K	K

Form 1041 (2021)

INSTRUCTIONS: PER THE



The following instructions apply only to grantor type trusts that are not using an optional filing

How to report. If the entire trust is a grantor trust, fill in only the entity information of Form 1041. Don't show any dollar amounts on the form itself; show dollar amounts only on an attachment to the form. Don't use Schedule K-1 (Form 1041) as the attachment.

FILE: WHERE TO

	THEN use this address if you:			
IF you are located in	Are not enclosing a check or money order	Are enclosing a check or money order		
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Manyland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin	Department of the Treasury Internal Revenue Service Kansas City, MO 84999-0048	Department of the Treasury Internal Revenue Service Kansas City, MO 64999–0148		
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Trass, Utah, Washington, Wyoming	Department of the Treasury Internal Revenue Service Ogden, Utah 84201-0048	Department of the Treasury Internal Revenue Service Ogden, Utah 84201-0148		
A foreign country or United States possession	Internal Revenue Service P.O. Box 409101 Ogden, Utah 84409	Internal Revenue Service P.O. Box 409101 Ogden, Utah 84409		