

A Check all that apply: Decedent's estate, Simple trust, Complex trust, Qualified disability trust, ESBT (S portion only), Grantor type trust, Bankruptcy estate—Ch. 7, Bankruptcy estate—Ch. 11, Pooled income fund.
B Number of Schedules K-1 attached (see instructions)
C Employer identification number SSNxxxxxxx
D Date entity created DATE OF BIRTH
E Nonexempt charitable and split-interest trusts, check applicable box(es).
F Check applicable boxes: Initial return, Final return, Amended return, Net operating loss carryback, Change in trust's name, Change in fiduciary, Change in fiduciary's name, Change in fiduciary's address.
G Check here if the estate or filing trust made a section 645 election. Trust TIN LEAVE BLANK

Table with 30 rows and 2 columns. Rows include Income (1-9), Deductions (10-22), and Tax and Payments (23-30). Each row has a description and a corresponding code in the second column.

Sign Here: Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.
BY: First Middle Last
Date: xx / xx / xxxx
EIN of fiduciary if a financial institution

Paid Preparer Use Only: Print/Type preparer's name, Preparer's signature, Date, Check if self-employed, PTIN, Firm's name, Firm's EIN, Firm's address, Phone no.



**Schedule A Charitable Deduction.** Don't complete for a simple trust or a pooled income fund.

<b>1</b>	Amounts paid or permanently set aside for charitable purposes from gross income. See instructions	<b>1</b>	L
<b>2</b>	Tax-exempt income allocable to charitable contributions. See instructions	<b>2</b>	E
<b>3</b>	Subtract line 2 from line 1	<b>3</b>	A
<b>4</b>	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes	<b>4</b>	V
<b>5</b>	Add lines 3 and 4	<b>5</b>	E
<b>6</b>	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes. See instructions	<b>6</b>	B
<b>7</b>	<b>Charitable deduction.</b> Subtract line 6 from line 5. Enter here and on page 1, line 13	<b>7</b>	L

**Schedule B Income Distribution Deduction**

<b>1</b>	Adjusted total income. See instructions	<b>1</b>	A
<b>2</b>	Adjusted tax-exempt interest	<b>2</b>	N
<b>3</b>	Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions	<b>3</b>	K
<b>4</b>	Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion)	<b>4</b>	
<b>5</b>	Capital gains for the tax year included on Schedule A, line 1. See instructions	<b>5</b>	
<b>6</b>	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	<b>6</b>	L
<b>7</b>	<b>Distributable net income.</b> Combine lines 1 through 6. If zero or less, enter -0-	<b>7</b>	E
<b>8</b>	If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law	<b>8</b>	A
<b>9</b>	Income required to be distributed currently	<b>9</b>	V
<b>10</b>	Other amounts paid, credited, or otherwise required to be distributed	<b>10</b>	E
<b>11</b>	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions	<b>11</b>	
<b>12</b>	Enter the amount of tax-exempt income included on line 11	<b>12</b>	B
<b>13</b>	Tentative income distribution deduction. Subtract line 12 from line 11	<b>13</b>	L
<b>14</b>	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0-	<b>14</b>	A
<b>15</b>	<b>Income distribution deduction.</b> Enter the smaller of line 13 or line 14 here and on page 1, line 18	<b>15</b>	N

**Schedule G Tax Computation and Payments** (see instructions)

**Part I – Tax Computation**

<b>1</b>	<b>Tax:</b>		
<b>a</b>	Tax on taxable income. See instructions	<b>1a</b>	
<b>b</b>	Tax on lump-sum distributions. Attach Form 4972	<b>1b</b>	B
<b>c</b>	Alternative minimum tax (from Schedule I (Form 1041), line 54)	<b>1c</b>	L
<b>d</b>	<b>Total.</b> Add lines 1a through 1c	<b>1d</b>	A
<b>2a</b>	Foreign tax credit. Attach Form 1116	<b>2a</b>	N
<b>b</b>	General business credit. Attach Form 3800	<b>2b</b>	K
<b>c</b>	Credit for prior year minimum tax. Attach Form 8801	<b>2c</b>	
<b>d</b>	Bond credits. Attach Form 8912	<b>2d</b>	
<b>e</b>	<b>Total credits.</b> Add lines 2a through 2d	<b>2e</b>	L
<b>3</b>	Subtract line 2e from line 1d. If zero or less, enter -0-	<b>3</b>	E
<b>4</b>	Tax on the ESBT portion of the trust (from ESBT Tax Worksheet, line 17). See instructions	<b>4</b>	A
<b>5</b>	Net investment income tax from Form 8960, line 21	<b>5</b>	V
<b>6</b>	Recapture taxes. Check if from: <input type="checkbox"/> Form 4255 <input type="checkbox"/> Form 8611	<b>6</b>	E
<b>7</b>	Household employment taxes. Attach Schedule H (Form 1040)	<b>7</b>	
<b>8</b>	Other taxes and amounts due	<b>8</b>	
<b>9</b>	<b>Total tax.</b> Add lines 3 through 8. Enter here and on page 1, line 24	<b>9</b>	B

**Part II – Payments**

<b>10</b>	2021 estimated tax payments and amount applied from 2020 return	<b>10</b>	L
<b>11</b>	Estimated tax payments allocated to beneficiaries (from Form 1041-T)	<b>11</b>	A
<b>12</b>	Subtract line 11 from line 10	<b>12</b>	N
<b>13</b>	Tax paid with Form 7004. See instructions	<b>13</b>	K
<b>14</b>	Federal income tax withheld. If any is from Form(s) 1099, check here <input type="checkbox"/>	<b>14</b>	
<b>15</b>	Current year net 965 tax liability from Form 965-A, Part I, column (f) (see instructions)	<b>15</b>	
<b>16</b>	Other payments: <b>a</b> Form 2439 ; <b>b</b> Form 4136 ; <b>Total</b>	<b>16c</b>	
<b>17</b>	Credit for qualified sick and family leave wages for leave taken before April 1, 2021	<b>17</b>	
<b>18</b>	Credit for qualified sick and family leave wages for leave taken after March 31, 2021	<b>18</b>	
<b>19</b>	<b>Total payments.</b> Add lines 12 through 15 and 16c through 18. Enter here and on page 1, line 26	<b>19</b>	



Other Information		Yes	No
<b>1</b>	Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses. Enter the amount of tax-exempt interest income and exempt-interest dividends . . . . . ▶ \$	L	L
<b>2</b>	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? . . . . .	E	E
<b>3</b>	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? . . . . . See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶	A	A
<b>4</b>	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 . . . . .	V	V
<b>5</b>	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
<b>6</b>	If this is an estate or a complex trust making the section 663(b) election, check here. See instructions . . . ▶ <input type="checkbox"/>		
<b>7</b>	To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here. See instructions . . ▶ <input type="checkbox"/>		
<b>8</b>	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 . . . . . ▶ <input type="checkbox"/>	B	B
<b>9</b>	Are any present or future trust beneficiaries skip persons? See instructions . . . . .		
<b>10</b>	Was the trust a specified domestic entity required to file Form 8938 for the tax year (see the Instructions for Form 8938)? . . . . .	L	L
<b>11a</b>	Did the estate or trust distribute S corporation stock for which it made a section 965(i) election? . . . . .	A	A
<b>b</b>	If "Yes," did each beneficiary enter into an agreement to be liable for the net tax liability? See instructions . . . . .		
<b>12</b>	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
<b>13</b>	<b>ESBTs only.</b> Does the ESBT have a nonresident alien grantor? If "Yes," see instructions . . . . .		
<b>14</b>	<b>ESBTs only.</b> Did the S portion of the trust claim a qualified business income deduction? If "Yes," see instructions . . . . .	K	K

### PER THE INSTRUCTIONS:



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

**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.

### WHERE TO FILE:

IF you are located in ...	THEN use this address if you:	
	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, Maryland, 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 64999-0048	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, Texas, 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