

# 2020 Fiduciary General Information

<b>Name and Address Information</b>													
Employer ID number	1												
Estate/trust name	2												
In-care-of name	3												
Street address	4										Suite #	5	
City	6												
<b>U.S. ONLY</b> State, ZIP, County	7	8	9										
<b>Foreign ONLY</b> Province/State, Country, Postal Code	10				11	12		Entity name control				13	
<b>Fiduciary Information</b>													
	First name						Last name						
If an individual	14						15						
If a business	16												
Fiduciary title	17	Trustee	18	Executor	19	Executrix	Other	20					
Fiduciary SSN/EIN	21				22		Fiduciary is a financial institution that submitted estimated tax payments for trusts for which it is the trustee						
Phone number	23												
<b>General Information</b>						<b>If not a calendar year</b>							
<b>A</b> Type of entity - Mark all that apply						Fiscal begin						53	
24 Decedent's estate						Fiscal end						54	
SSN						25	Date of death			26			
Name: First						27							
Last						28							
29 Simple trust			30 Complex trust										
31 Qualified disability			32 ESBT (S only)										
33 Full Grantor			34 Partial Grantor										
35 Bankruptcy estate - Chapter 7			36 Bankruptcy estate - Chapter 11										
37 Pooled income fund													
<b>D</b> Date entity created						38							
<b>E</b> Nonexempt charitable and split-interest trusts. Mark applicable boxes:						<b>Other Information</b>							
39 Described in Section 4947(a)(1)						Distribute all income						55	
40 Not a private foundation						Distribute NET capital gain						56	
41 Described in Section 4947(a)(2)						Carry the applicable amount of depreciation, depletion, and amortization to Schedules C, E, or F instead of line 9 of the beneficiary's Schedule K-1.						57	
<b>F</b> Mark applicable boxes:						Resident state						58	
42 Initial return			43 Final return			Firm number						59	
44 Amended return						Preparer number						60	
46 NOL carryback						ERO number						61	
47 Change in trust's name			48 Change in fiduciary			Preparer fee						62	
49 Change in fiduciary's name			50 Change in fiduciary's address			Date closed/terminated						63	
<b>G</b> Estate or filing trust made a section 645 election						Misc code 1						64	
52 Trust EIN if 645 election						Misc code 2						65	
						Invoice number						66	
						<b>2210 Information</b>							
						2019 federal tax						67	
						2019 state tax						68	
<b>Client information (for client reports only)</b>													
Email	69												
Cell	70				Fax	71							

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**2020 Schedule K-1**

**Beneficiary Information**

ID Number   Form 1042S  Make this beneficiary the rounding beneficiary

Name **First name**  **MI**

**Last name**  **Suffix**  **Professional**

Entity name (if not individual)

Care of/FBO/DBA   Federal %

Address   State %

City   Amended K-1

**U.S. ONLY** State, ZIP   Resident State   Final K-1

**Foreign ONLY** Province/State, country, postal code     Foreign beneficiary

Phone Number

E-mail Address   Deliver by Secure File Pro

K1  
2-1

K1 Overrides		Code	2020 Amount	2019 Amount		Code	2020 Amount	2019 Amount
1	Interest income	27			11	45	46	
2a	Ordinary dividends	28				47	48	
2b	Qualified dividends	29				49	50	
3	Net short-term capital gain	30				51	52	
4a	Net long-term capital gain	31				53	54	
4b	28% rate gain	32			55	56		
4c	Unrecaptured 1250 gain	33			12	57	58	
5	Other portfolio income	34				59	60	
6	Ordinary business income	35				61	62	
7	Net rental real estate income	36			63	64		
8	Other rental income	37			65	66		
9	Directly apportioned deductions	38	39		13	67	68	
		40	41			69	70	
		42	43			71	72	
44			73	74				
10	Estate tax deduction					75	76	
					14	77	78	
						79	80	
						81	82	
						83	84	
						85	86	

## 2020 State General Information

### Trust Information

- 1 Revocable
- 2 Irrevocable
- 3 Testamentary
- 4 Inter vivos
- 5 Charitable remainder

14 Composite for State Purposes

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15-1

### Method of Accounting

- 6 Cash
- 7 Accrual

Other - specify:

### Additional or Fiduciary Information

Street address	<input type="text" value="9"/>		
City, state, ZIP	<input type="text" value="10"/>	<input type="text" value="11"/>	<input type="text" value="12"/>
E-mail	<input type="text" value="13"/>		