

Beneficiary's Share of Income, Deductions, and Credits

Taxpayer's name

Taxpayer's SSN

Estate or trust information

A. Estate or trust EIN or SSN _____
B. Estate or trust name _____

Fiduciary information

C. Fiduciary's name, address, city, state, and ZIP code _____

Beneficiary information

D. Beneficiary's SSN or EIN _____
E. Beneficiary's name, address, city, state, and ZIP code _____

F. Beneficiary's phone number _____

G. Percent of Utah income _____

Other information

For Utah State Tax Commission Use Only

Beneficiary's Share of Utah Income, Deductions and Credits

1a. Utah U. S. government interest income	_____	.00
1b. Utah municipal bond interest income	_____	.00
1c. Utah other interest income	_____	.00
2. Utah ordinary dividends	_____	.00
3. Utah net short-term capital gain	_____	.00
4. Utah net long-term capital gain	_____	.00
5. Utah other portfolio and nonbusiness income	_____	.00
6. Utah ordinary business income	_____	.00
7. Utah net rental real estate income	_____	.00
8. Utah other rental income	_____	.00
9. Utah directly apportioned deductions (describe)	_____	.00
	_____	.00
	_____	.00
	_____	.00
10. Estate tax deduction	_____	.00
11. Final year Utah deductions (describe)	_____	.00
	_____	.00
	_____	.00
	_____	.00
12. Other Utah information	_____	.00
	_____	.00
	_____	.00
	_____	.00
13. Utah nonrefundable credits allocated to beneficiary		
Name of credit	Code	Credit amount
_____	_____	.00
_____	_____	.00
_____	_____	.00
_____	_____	.00
14. Utah refundable credits allocated to beneficiary		
Name of credit	Code	Credit amount
_____	_____	.00
_____	_____	.00
_____	_____	.00
_____	_____	.00