

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 _____

H. Dependent beneficiary - enter "X" _____
"Statement of Dependent Beneficiary Income" on file with trustee

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
15. Utah tax withheld on behalf of beneficiary		.00
"X" if withholding waiver applied for	_____	