

**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

For calendar year 2011 or fiscal year beginning \_\_\_\_\_, 2011, and ending \_\_\_\_\_, 20\_\_\_\_

Name of estate or trust (If a grantor type trust, see the instructions.)

Name and title of fiduciary

Number, street, and room or suite no. (If a P.O. box, see the instructions.)

City or town, state, and ZIP code

**C** Employer identification number

**D** Date entity created

**E** Nonexempt charitable and split-interest trusts, check applicable box(es), see instructions.  
 Described in sec. 4947(a)(1). Check here if not a private foundation . . .   
 Described in sec. 4947(a)(2)

**B** Number of Schedules K-1 attached (see instructions) ▶

**F** Check applicable boxes:  
 Initial return     Final return     Amended return  
 Change in fiduciary     Change in fiduciary's name

**G** Check here if the estate or filing trust made a section 645 election . . . . .

<b>Income</b>	<b>1</b> Interest income . . . . .	<b>1</b>	
	<b>2a</b> Total ordinary dividends . . . . .	<b>2a</b>	
	<b>b</b> Qualified dividends allocable to: <b>(1)</b> Beneficiaries _____ <b>(2)</b> Estate or trust _____		
	<b>3</b> Business income or (loss). Attach Schedule C or C-EZ (Form 1040) . . . . .	<b>3</b>	
	<b>4</b> Capital gain or (loss). Attach Schedule D (Form 1041) . . . . .	<b>4</b>	
	<b>5</b> Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 1040) . . . . .	<b>5</b>	
	<b>6</b> Farm income or (loss). Attach Schedule F (Form 1040) . . . . .	<b>6</b>	
	<b>7</b> Ordinary gain or (loss). Attach Form 4797 . . . . .	<b>7</b>	
	<b>8</b> Other income. List type and amount _____	<b>8</b>	
<b>9</b> <b>Total income.</b> Combine lines 1, 2a, and 3 through 8 . . . . . ▶	<b>9</b>		
<b>Deductions</b>	<b>10</b> Interest. Check if Form 4952 is attached ▶ <input type="checkbox"/>	<b>10</b>	
	<b>11</b> Taxes . . . . .	<b>11</b>	
	<b>12</b> Fiduciary fees . . . . .	<b>12</b>	
	<b>13</b> Charitable deduction (from Schedule A, line 7) . . . . .	<b>13</b>	
	<b>14</b> Attorney, accountant, and return preparer fees . . . . .	<b>14</b>	
	<b>15a</b> Other deductions <b>not</b> subject to the 2% floor (attach schedule) . . . . .	<b>15a</b>	
	<b>b</b> Allowable miscellaneous itemized deductions subject to the 2% floor . . . . .	<b>15b</b>	
	<b>16</b> Add lines 10 through 15b . . . . . ▶	<b>16</b>	
	<b>17</b> Adjusted total income or (loss). Subtract line 16 from line 9 . . . . . <b>17</b>		
	<b>18</b> Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 1041) . . . . .	<b>18</b>	
	<b>19</b> Estate tax deduction including certain generation-skipping taxes (attach computation) . . . . .	<b>19</b>	
<b>20</b> Exemption . . . . .	<b>20</b>		
<b>21</b> Add lines 18 through 20 . . . . . ▶	<b>21</b>		
<b>Tax and Payments</b>	<b>22</b> Taxable income. Subtract line 21 from line 17. If a loss, see instructions . . . . .	<b>22</b>	
	<b>23</b> <b>Total tax</b> (from Schedule G, line 7) . . . . .	<b>23</b>	
	<b>24</b> <b>Payments:</b> a 2011 estimated tax payments and amount applied from 2010 return . . . . .	<b>24a</b>	
	<b>b</b> Estimated tax payments allocated to beneficiaries (from Form 1041-T) . . . . .	<b>24b</b>	
	<b>c</b> Subtract line 24b from line 24a . . . . .	<b>24c</b>	
	<b>d</b> Tax paid with Form 7004 (see instructions) . . . . .	<b>24d</b>	
	<b>e</b> Federal income tax withheld. If any is from Form(s) 1099, check ▶ <input type="checkbox"/>	<b>24e</b>	
	Other payments: <b>f</b> Form 2439 _____; <b>g</b> Form 4136 _____; Total ▶	<b>24h</b>	
	<b>25</b> <b>Total payments.</b> Add lines 24c through 24e, and 24h . . . . . ▶	<b>25</b>	
<b>26</b> Estimated tax penalty (see instructions) . . . . .	<b>26</b>		
<b>27</b> <b>Tax due.</b> If line 25 is smaller than the total of lines 23 and 26, enter amount owed . . . . .	<b>27</b>		
<b>28</b> <b>Overpayment.</b> If line 25 is larger than the total of lines 23 and 26, enter amount overpaid . . . . .	<b>28</b>		
<b>29</b> Amount of line 28 to be: <b>a Credited to 2012 estimated tax</b> ▶ _____; <b>b Refunded</b> ▶ _____	<b>29</b>		

**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.

Signature of fiduciary or officer representing fiduciary \_\_\_\_\_ Date \_\_\_\_\_ EIN of fiduciary if a financial institution \_\_\_\_\_

May the IRS discuss this return with the preparer shown below (see instr.)?  Yes  No

**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.** Do not complete for a simple trust or a pooled income fund.

Table with 7 rows for Schedule A Charitable Deduction. Columns include line numbers (1-7), descriptions of amounts paid, tax-exempt income, and calculations, and a grid for entering values.

**Schedule B Income Distribution Deduction**

Table with 15 rows for Schedule B Income Distribution Deduction. Columns include line numbers (1-15), descriptions of adjusted total income, tax-exempt interest, net gain, and distributions, and a grid for entering values.

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

Table with 7 main rows for Schedule G Tax Computation. Columns include sub-rows (1a-1d, 2a-2d, 3-7), descriptions of tax on taxable income, foreign tax credit, and total tax, and a grid for entering values.

**Other Information**

Table with 9 rows for Other Information. Columns include question numbers (1-9), descriptions of tax-exempt income, earnings, foreign interest, foreign trusts, residence interest, and elections, and Yes/No columns.