

Header section containing identification information, filing status (Initial return checked), and trust details like name and address.

Income section table with columns for line number, description (e.g., Interest income, Dividends), and amount.

Deductions section table with columns for line number, description (e.g., Interest, Taxes, Fiduciary fees), and amount.

Tax and Payments section table with columns for line number, description (e.g., Taxable income, Total tax, Total payments), and amount.

Signature section with 'Sign Here' label, signature of fiduciary, date, and EIN.

Paid Preparer Use Only section with fields for preparer name, signature, date, firm name, EIN, and phone number.

*THE AMOUNT SHOULD BE THE TOTAL YOU DISCHARGED WITH ALL OF YOUR A4V ENDORSED PAYMENT VOUCHERS / PROMISSORY NOTES / NEGOTIABLE INSTRUMENTS FOR THE WHOLE TAX YEAR.

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

1	Amounts paid or permanently set aside for charitable purposes from gross income. See instructions	1	-0-
2	Tax-exempt income allocable to charitable contributions. See instructions	2	
3	Subtract line 2 from line 1	3	
4	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes	4	-0-
5	Add lines 3 and 4	5	
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes. See instructions	6	
7	Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13	7	-0-

Schedule B Income Distribution Deduction

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

Schedule G Tax Computation and Payments (see instructions)

Part I – Tax Computation

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

Part II – Payments

10	2022 estimated tax payments and amount applied from 2021 return	10	-0-
11	Estimated tax payments allocated to beneficiaries (from Form 1041-T)	11	-0-
12	Subtract line 11 from line 10	12	-0-
13	Tax paid with Form 7004. See instructions	13	-0-
14	Federal income tax withheld. If any is from Form(s) 1099, check here <input type="checkbox"/>	14	-0-
15	Current year net 965 tax liability from Form 965-A, Part I, column (f) (see instructions)	15	-0-
16	Other payments: a Form 2439 ; b Form 4136 ; Total	16c	-0-
17	Credit for qualified sick and family leave wages for leave taken before April 1, 2021	17	-0-
18	Credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021	18	-0-
19	Total payments. Add lines 12 through 15 and 16c through 18. Enter here and on page 1, line 26	19	

Other Information		Yes	No
1	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. \$ <u>-0-</u>		X
2	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?		X
3	At any time during calendar year 2022, 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		X
4	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		X
5	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		X
6	If this is an estate or a complex trust making the section 663(b) election, check here. See instructions <input type="checkbox"/>		
7	To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here. See instructions <input type="checkbox"/>		
8	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"/>		
9	Are any present or future trust beneficiaries skip persons? See instructions		X
10	Was the trust a specified domestic entity required to file Form 8938 for the tax year? See the Instructions for Form 8938		X
11a	Did the estate or trust distribute S corporation stock for which it made a section 965(i) election?		X
b	If "Yes," did each beneficiary enter into an agreement to be liable for the net tax liability? See instructions		
12	Did the estate or trust either make a section 965(i) election or enter into a transfer agreement as an eligible 965(i) transferee for S corporation stock held on the last day of the tax year? See instructions		X
13	ESBTs only. Does the ESBT have a nonresident alien grantor? If "Yes," see instructions		
14	ESBTs only. Did the S portion of the trust claim a qualified business income deduction? If "Yes," see instructions		

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**TAX AMOUNT -- REFER TO THE BELOW AND CALCULATE FROM THE TOTAL AMOUNT ABOVE:

Tax Rate	Taxable Income (Single)
10%	Up to \$10,275
12%	\$10,276 to \$41,775
22%	\$41,776 to \$89,075
24%	\$89,076 to \$170,050
32%	\$170,051 to \$215,950
35%	\$215,951 to \$539,900
37%	Over \$539,900


***OVERPAYMENT IS THE TOTAL AMOUNT ISSUED SUBTRACTED BY THE AMOUNT DUE AND THE TAX AMOUNT.
 EXAMPLE: \$50,000 INSTRUMENT - 8,000 DUE - \$11,000 TAX
 OVERPAYMENT = \$31,000

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

PER THE 2021 INSTRUCTIONS:

(YOU MAY LEAVE MUCH OF THIS FORM BLANK.)

 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.

← **WHEN TO FILE:**
 BEFORE APR. 28
 (FILE ONCE)