

Form 2 Wisconsin fiduciary income tax for estates or trusts

2016

Use **BLACK INK** For 2016 or taxable year beginning and ending
M M D D Y Y Y Y M M D D Y Y Y Y

DO NOT STAPLE

| | | |
|---|-----------------------------|---------------------|
| <small>ESTATES ONLY</small> – Decedent's legal last name | Decedent's legal first name | <small>M.I.</small> |
| <small>ESTATES ONLY</small> – Decedent's social security number | Estate's federal EIN | |
| <small>TRUSTS ONLY</small> – Legal name | Trust's federal EIN | |
| Name of personal representative, petitioner, or trustee | | |
| Address of personal representative, petitioner, or trustee | City | State Zip code |
| County of jurisdiction | Probate case number | |

| | |
|--|--|
| Check if applicable <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address or name change | <i>Check one</i> |
| Date trust or bankruptcy estate was created or date of decedent's death <u> </u> <small>M M D D Y Y Y Y</small> If an estate, enter age of decedent at date of death <u> </u> If this is a trust return, is the trust <input type="checkbox"/> Revocable or <input type="checkbox"/> Irrevocable? If a trust, is the grantor a resident of Wisconsin? <input type="checkbox"/> Yes <input type="checkbox"/> No Has Form W706 been filed? <input type="checkbox"/> Yes <input type="checkbox"/> No Special Conditions <input type="checkbox"/> _____ Address where decedent lived at time of death _____ Zip code _____ | <input type="checkbox"/> Electing small business trust <input type="checkbox"/> Qualified funeral trust <input type="checkbox"/> Bankruptcy estate <input type="checkbox"/> Inter vivos trust <input type="checkbox"/> Testamentary trust <input type="checkbox"/> Section 645 election <input type="checkbox"/> Decedent's estate |

Print numbers like this → 0 1 2 3 4 5 6 7 8 9 Not like this → 0147 NO COMMAS; NO CENTS

Paperclip check or money order here

| | | |
|---|-----------|-----|
| 1 Federal taxable income of fiduciary (see instructions) | 1 | .00 |
| 2 Additions (from Schedule A or NR) | 2 | .00 |
| 3 Add lines 1 and 2 | 3 | .00 |
| 4 Subtractions (from Schedule A or NR) | 4 | .00 |
| 5 Wisconsin taxable income of fiduciary (subtract line 4 from line 3) | 5 | .00 |
| 6a Gross tax (see instructions, page 4) | 6a | .00 |
| 6b ESBT (see instructions, page 5) | 6b | .00 |
| 7 Certain nonrefundable credits from line 11 of Schedule CR | 7 | .00 |
| 8 Subtract line 7 from line 6a. If line 7 is larger than line 6a, fill in zero (0) | 8 | .00 |
| 9 Alternative minimum tax. Enclose Schedule MT | 9 | .00 |
| 10 Add lines 8 and 9 | 10 | .00 |
| 11 Other credits from Schedule CR, line 35 | 11 | .00 |
| 12 Net tax paid to another state. Enclose Schedule OS | 12 | .00 |
| 13 Add credits on lines 11 and 12 | 13 | .00 |
| 14 Subtract line 13 from line 10. If line 13 is larger than line 10, enter zero (0) | 14 | .00 |



NO COMMAS; NO CENTS

| | | | |
|--|---------------------------------------|------------|-------|
| 15 Enter amount from line 14 | 15 | _____ | .00 |
| 16 Wisconsin income tax withheld (see instructions) | 16 | _____ | .00 |
| 17 2016 estimated payments and amount applied from 2015 return .. | 17 | _____ | .00 |
| 18 Farmland preservation credit. a Schedule FC, line 18 | 18a | _____ | .00 |
| | b Schedule FC-A, line 13 | 18b | _____ |
| 19 Other credits from Schedule CR, line 39 | 19 | _____ | .00 |
| 20 AMENDED RETURN ONLY – amount paid with the original return | 20 | _____ | .00 |
| 21 Add lines 16 through 20 | 21 | _____ | .00 |
| 22 AMENDED RETURN ONLY – refund from original return less amount applied to 2017 estimated tax | 22 | _____ | .00 |
| 23 Subtract line 22 from line 21 | 23 | _____ | .00 |
| 24 If line 23 is larger than line 15, subtract line 15 from line 23. | AMOUNT OVERPAID 24 | _____ | .00 |
| 25 Amount of line 24 to be REFUNDED TO YOU | 25 | _____ | .00 |
| 26 Amount of line 24 to be applied to your 2017 ESTIMATED TAX .. | 26 | _____ | .00 |
| 27 If line 23 is less than line 15, subtract line 23 from line 15 | BALANCE DUE 27 | _____ | .00 |
| 28 Underpayment interest. Exception code – See Schedule U ▶ _____ | 28 | _____ | .00 |
| Also include on line 27 (see instructions, page 7) | | | |



Paper clip copies of federal Form 1041 and schedules to this return.

Also paper clip copies of Wisconsin Schedules 2K-1, 2M, NR, and WD (Form 2) and other documents, if required. A request for a closing certificate for fiduciaries must be made on Schedule CC. See instructions.

I, as fiduciary, declare under penalties of law that I have examined this return (including accompanying schedules, statements, and copy of federal income tax return) and to the best of my knowledge and belief it is true, correct, and complete.

Your signature Date Daytime phone

PERSON PREPARING RETURN (individual and firm) if other than the preceding signer Date Daytime phone
Name Signature of preparer

Mail your return to: Wisconsin Department of Revenue

- *If making a payment or submitting Schedule CC to request a closing certificate*PO Box 8918, Madison WI 53708-8918
- *All other trusts and estates*.....PO Box 8955, Madison WI 53708-8955

| | | | |
|-------------------------|---|--|--|
| For Department Use Only | C | | |
| | | | |



| | | |
|-------------------------|-----------------------------------|-------------------------|
| Name(s) shown on Form 2 | Decedent's social security number | Estate's / Trust's FEIN |
|-------------------------|-----------------------------------|-------------------------|

SCHEDULE A – Additions and Subtractions { Resident estates and trusts only. Part-year and nonresident estates and trusts must enclose Schedule NR. }

| | COL. 1-Distributable Income (Report on Schedule 2K-1) | COL. 2 Nondistributable Income |
|---|--|-----------------------------------|
| ADDITIONS: | | |
| 1. Adjustment from Schedule B of Form 2 | | .00 |
| 2. Interest (less related expenses) on state and municipal obligations | .00 | .00 |
| 3. Deduction for taxes from federal Form 1041 | .00 | .00 |
| 4. Capital gain/loss adjustment (see instructions) | | .00 |
| 5. Other additions: | | |
| COL. 1 – enter total and describe below | .00 | |
| COL. 2 – enter amount from Part I, line 21, of Schedule 2M | | .00 |
| 6. Add lines 1 through 5 and enter on line 2 of Form 2 | | .00 |
| SUBTRACTIONS: | | |
| 7. Adjustment from Schedule B of Form 2 | | .00 |
| 8. Interest (less related expenses) on obligations of the United States | .00 | .00 |
| 9. Capital gain/loss adjustment (see instructions) | | .00 |
| 10. Refunds of state and local taxes (see instructions) | .00 | .00 |
| 11. Other subtractions: | | |
| COL. 1 – enter total and describe below | .00 | |
| COL. 2 – enter amount from Part II, line 35, of Schedule 2M | | .00 |
| 12. Add lines 7 through 11 and enter on line 4 of Form 2 | | .00 |

SCHEDULE B – Adjustments to Convert 2016 Federal Taxable Income to the Amount Allowable for Wisconsin (see instructions on page 11)

| NATURE OF ADJUSTMENT – Explain fully on enclosed schedule. | Adjustments for 2016 | |
|--|--|---|
| | COL. 1 – Distributable (Enter on Schedule 2K-1) | COL. 2 – Nondistributable (Enter on Schedule A*) |
| 1. TOTAL from enclosed schedule | .00 | .00 |

* If a **positive number**, enter on line 1.
If a **negative number**, enter on line 7 as a positive number.

Note: The figure in COL. 2 must be used by part-year and nonresident estates and trusts to complete Part I of Schedule NR.

SCHEDULE C – Adjustments to Capital Gains/Losses Because Capital Assets Disposed of Had Different Basis for Wisconsin and Federal Income Tax Purposes

| 1. Description of capital assets held ONE YEAR OR LESS and reason for difference in basis | A. Federal Adjusted Basis | B. Wisconsin Adjusted Basis | C. Difference |
|---|---------------------------|-----------------------------|---------------|
| a. | .00 | .00 | .00 |
| b. | .00 | .00 | .00 |
| c. | .00 | .00 | .00 |
| 2. TOTAL – Combine amounts in column C. Fill in here and on line 6 of Wisconsin Schedule WD (Form 2) | | | .00 |
| 3. Description of capital assets held MORE THAN ONE YEAR and reason for difference in basis | A. Federal Adjusted Basis | B. Wisconsin Adjusted Basis | C. Difference |
| a. | .00 | .00 | .00 |
| b. | .00 | .00 | .00 |
| c. | .00 | .00 | .00 |
| 4. TOTAL – Combine amounts in column C. Fill in here and on line 15 of Wisconsin Schedule WD (Form 2) | | | .00 |