

Form 2 Wisconsin fiduciary income tax for estates or trusts

2011

Use **BLACK INK** For 2011 or taxable year beginning and ending

DO NOT STAPLE

ESTATES ONLY – Legal last name		Legal first name	M.I.	Decedent's social security number
TRUSTS ONLY – Legal name				
Name of personal representative, petitioner, or trustee				
Address of personal representative, petitioner, or trustee		City	State	Zip code
County of jurisdiction		Probate case number		Estate's/Trust's federal EIN
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				Check one
Date trust or bankruptcy estate was created or date of decedent's death <u> </u> <u> </u> <u> </u> <u> </u> <u> </u> <u> </u> <u> </u> <u> </u>				<input type="checkbox"/> Electing small business trust
If an estate, enter age of decedent at date of death <u> </u>				<input type="checkbox"/> Qualified funeral trust
If this is a trust return, is the trust <input type="checkbox"/> Revocable or <input type="checkbox"/> Irrevocable?				<input type="checkbox"/> Bankruptcy estate
If a trust, is the grantor a resident of Wisconsin? <input type="checkbox"/> Yes <input type="checkbox"/> No				<input type="checkbox"/> Inter vivos trust
Has Form W706 been filed? <input type="checkbox"/> Yes <input type="checkbox"/> No				<input type="checkbox"/> Testamentary trust
Special Conditions <input type="checkbox"/>				<input type="checkbox"/> Section 645 election
Address where decedent lived at time of death			Zip code	
<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 4)	6b	.00
7	Supplement to federal historic rehabilitation credit	7	.00
8	Certain nonrefundable credits from line 6 of Schedule CR	8	.00
9	Add credits on lines 7 and 8	9	.00
10	Subtract line 9 from line 6a. If line 9 is larger than line 6a, fill in zero (0)	10	.00
11	Alternative minimum tax. Enclose Schedule MT	11	.00
12	Add lines 10 and 11	12	.00
13	Other credits from Schedule CR, line 19	13	.00
14	Net tax paid to another state. Enclose Schedule OS	14	.00
15	Add credits on lines 13 and 14	15	.00
16	Subtract line 15 from line 12. If line 15 is larger than line 12, enter zero (0)	16	.00



Name(s) shown on Form 2	Decedent's social security number	Estate's / Trust's FEIN
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SCHEDULE A – Additions and Subtractions { Resident estates and trusts only. Part-year and nonresident estates and trusts must enclose Schedule NR. }

ADDITIONS:	COL. 1-Distributable Income (Report on Schedule 2K-1)	COL. 2 Nondistributable Income
1. Adjustment to convert 2011 federal taxable income to the amount allowable for Wisconsin (Schedule B) . . . . .	.00	.00
2. Interest (less related expenses) on state and municipal obligations . . . . .	.00	.00
3. Taxes from line 11 of federal Form 1041 . . . . .	.00	.00
4. Capital gain/loss adjustment (see instructions) . . . . .	.00	.00
5. Other (specify) _____	.00	.00
6. Total additions (add lines 1 through 5). Enter the amount from COL. 2 on line 2 of Form 2 . . . . .	.00	.00

SUBTRACTIONS:	COL. 1-Distributable Income (Report on Schedule 2K-1)	COL. 2 Nondistributable Income
7. Adjustment to convert 2011 federal taxable income to the amount allowable for Wisconsin (Schedule B) . . . . .	.00	.00
8. Interest (less related expenses) on obligations of the United States . . . . .	.00	.00
9. Capital gain/loss adjustment (see instructions) . . . . .	.00	.00
10. Refunds of state and local taxes (see instructions) . . . . .	.00	.00
11. Other (specify) _____	.00	.00
12. Total subtractions (add lines 7 through 11). Enter the amount from COL. 2 on line 4 of Form 2 . . . . .	.00	.00

SCHEDULE B – Adjustments to Convert 2011 Federal Taxable Income to the Amount Allowable for Wisconsin (see instructions on page 11)

NATURE OF ADJUSTMENT – Explain fully on enclosed schedule.	Adjustments for 2011	
	COL. 1 – Distributable	COL. 2 – Nondistributable
1. TOTAL from enclosed schedule . . . . .	.00	.00

- a. Enter total from distributable column on Wisconsin Schedule 2K-1, as appropriate.
- b. If total in nondistributable column is a **positive number**, enter it on Schedule A, line 1.
If total in nondistributable column is a **negative number**, enter it on Schedule A, line 7, as a positive number.

Note: The figure in the nondistributable column 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
d. _____	.00	.00	.00
2. TOTAL – Combine amounts in column C. Fill in here and on line 4 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
d. _____	.00	.00	.00
4. TOTAL – Combine amounts in column C. Fill in here and on line 12 of Wisconsin Schedule WD (Form 2) . . . . .			.00