

Beneficiary's Share of Income, Deductions, etc.

For 2018 or taxable year beginning MMDDYYYY and ending MMDDYYYY

Part I: Information About the Estate or Trust

Form with fields: Name of Estate or Trust, Estate's or Trust's FEIN, Estate's or Trust's Address, Estate's or Trust's City, State, Estate's or Trust's Zip Code

Part II: Information About the Beneficiary

Form with fields: Beneficiary's Business Name, Beneficiary's FEIN, Beneficiary's Last Name, Beneficiary's First Name, M.I., Beneficiary's SSN, Beneficiary's Address, Beneficiary's City, State, Beneficiary's Zip Code

If the beneficiary is a disregarded entity or trust, enter the name and identifying number of the taxpayer to whom this income will be reported:

Form with fields: Business Name, FEIN, Individual's Last Name, First Name, M.I., SSN

A Check if applicable: [ ] Final 2K-1 [ ] Amended 2K-1

B Beneficiary's state of residence \_\_\_\_\_

C [ ] Check if beneficiary is a nonresident and filed Form PW-2 to opt out of pass-through entity withholding



Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items NO COMMAS; NO CENTS

Table with 5 columns: (a) Distributive share items, (b) Federal amount, (c) Adjustment, (d) Amount under Wis. law, (e) Wis. source amount. Rows include Interest Income, Ordinary Dividends, Net short-term capital gain, Net long-term capital gain, Other portfolio income, Ordinary business income, Net rental real estate income, Other rental income, Directly apportioned deductions, Estate tax deduction.

**Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items NO COMMAS; NO CENTS**

	(a)	(b)	(c)	(d)	(e)
	<u>Distributive share items</u>	<u>Federal amount</u>	<u>Adjustment</u>	<u>Amount under Wis. law</u>	<u>Wis. source amount (see Form 2 instructions)</u>
<b>11</b>	Final year deductions <i>(list)</i>				
<b>a</b>	_____	<b>11a</b> _____	_____	<b>11a</b> _____	_____
<b>b</b>	_____	<b>11b</b> _____	_____	<b>11b</b> _____	_____
<b>c</b>	_____	<b>11c</b> _____	_____	<b>11c</b> _____	_____
<b>d</b>	_____	<b>11d</b> _____	_____	<b>11d</b> _____	_____
<b>e</b>	Total (add lines 11a through 11d)	<b>11e</b> _____	_____	<b>11e</b> _____	_____
<b>12</b>	Alternative minimum tax item <i>(list)</i> :				
<b>a</b>	_____	<b>12a</b> _____	_____	<b>12a</b> _____	_____
<b>b</b>	_____	<b>12b</b> _____	_____	<b>12b</b> _____	_____
<b>c</b>	_____	<b>12c</b> _____	_____	<b>12c</b> _____	_____
<b>13</b>	Other information <i>(list)</i> :				
<b>a</b>	_____	<b>13a</b> _____	_____	<b>13a</b> _____	_____
<b>b</b>	_____	<b>13b</b> _____	_____	<b>13b</b> _____	_____
<b>c</b>	_____	<b>13c</b> _____	_____	<b>13c</b> _____	_____
<b>14a</b>	Related entity expense addback .....			<b>14a</b> _____	
<b>b</b>	Related entity expense allowable .....			<b>14b</b> _____	
<b>15</b>	Wisconsin Credits:				
<b>a</b>	Schedule _____ .....			<b>15a</b> _____	
<b>b</b>	Schedule _____ .....			<b>15b</b> _____	
<b>c</b>	Schedule _____ .....			<b>15c</b> _____	
<b>d</b>	Schedule _____ .....			<b>15d</b> _____	
<b>e</b>	Schedule _____ .....			<b>15e</b> _____	
<b>f</b>	Schedule _____ .....			<b>15f</b> _____	
<b>g</b>	Schedule _____ .....			<b>15g</b> _____	
<b>h</b>	Schedule _____ .....			<b>15h</b> _____	
<b>i</b>	Schedule _____ .....			<b>15i</b> _____	
<b>j</b>	Wisconsin tax withheld (Do NOT include withholding from Forms 1099-R, W-2, and W2-G) ..			<b>15j</b> _____	_____
<b>16</b>	Income (loss) .....			<b>16</b> _____	_____

