1041 Department of the Treasury—Internal Revenue Service U.S. Income Tax Return for Estates and Trusts

2011

OMB No. 1545-0092

<u> </u>	hook	all the	t apply:	For colondar vo				<u> </u>		l andina		OND 10. 1545	
A Check all that apply:				For calendar year 2011 or fiscal year beginning , 2011, and Name of estate or trust (If a grantor type trust, see the instructions.)						ending , 20 C Employer identification number			
Decedent's estate				Traine of estate of trust (if a grantof type trust, see the instructions.)						C Employer identification number			
=		e trust		AL LOW COLD									
	Comp	lex tru	st	Name and title of fiduciary						D Date entity created			
	Qualifi	ed dis	ability trust										
	SBT	(S por									E Nonexempt charitable and split- interest trusts, check applicable		
	Granto	or type	trust									instructions.	10
	Bankrı	uptcy	estate-Ch. 7							Described in sec. 4947(a)(1). Check here			
	3ankri	uptcy	estate-Ch. 11	City or town, state, and ZIP code						if not a private foundation ▶			
П	Poole	d inco	me fund								•	in sec. 4947(a)(2)	
B Number of Schedules K-1				F Check	Initial re	turn	nal return	Amended retu	rn	+=-		trust's name	
attached (see instructions) ▶				applicable boxes: Change in fiduciary Change in fiduciary's name							J	fiduciary's address	\$
				ng trust made a sec			•		oldry o Harrio		iango iii	nadolary o address	
	1		terest incom								1		
Income	2a										2a		+
	_			dividends							Za		+
											3		
	3			, ,	s). Attach Schedule C or C-EZ (Form 1040)						H -		+
	4		Capital gain or (loss). Attach Schedule D (Form 1041)								4		
	5		-						-	-	5		_
	6		Farm income or (loss). Attach Schedule F (Form 1040)								6		
	7			or (loss). Attach					7		4		
	8			List type and a							8		
	9	T	otal income.	. Combine lines	1, 2a, and	d 3 through	8			<u> ▶</u>	9		
Tax and Payments Deductions	10	In	terest. Chec	k if Form 4952	is attache	d ▶ □					10		
	11	Ta	axes								11		
	12	Fi	Fiduciary fees								12		
	13	С	Charitable deduction (from Schedule A, line 7)								13		
	14	A ⁻	Attorney, accountant, and return preparer fees								14		
	15a		Other deductions not subject to the 2% floor (attach schedule)								15a		
	k		Allowable miscellaneous itemized deductions subject to the 2% floor								15b		
	16		Add lines 10 through 15b								16		+
	17		Adjusted total income or (loss). Subtract line 16 from line 9 17										
	18		Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 1041)										_
	19		Estate tax deduction including certain generation-skipping taxes (attach computation)								18 19		+
	20										20		+
	21		Exemption								21		+
													+
	22		Taxable income. Subtract line 21 from line 17. If a loss, see instructions								22		-
	23		Total tax (from Schedule G, line 7)								23		+
	24		Payments: a 2011 estimated tax payments and amount applied from 2010 return								24a		_
	k		Estimated tax payments allocated to beneficiaries (from Form 1041-T)								24b		_
			Subtract line 24b from line 24a								24c		
	(Federal income tax withheld. If any is from Form(s) 1099, check ▶ □ · · · · · · · · · · · · · · · · · ·								24d		
	•										24e		
ЭĽ			ther payments:			·····;	g Form 4136		;	I otal ▶	24h		
Tax	25		Total payments. Add lines 24c through 24e, and 24h								25		
	26										26		4
	27						•				27		4
	28			If line 25 is lar	_			to, enter amou	-		28		
	29			e 28 to be: a C i erjury, I declare tha				ompanying sab = =	; b Refu		29	host of my leased	odgo ca-l
Sig	ar l			erjury, i deciare tha ect, and complete. I									suge and
								_				ay the IRS discuss t	
He	re	<u>C:</u>	anature of fider-	ary or officer repres	onting fidure!	any D	ate	EINI of fiction:	ary if a financi	al inctituti		ith the preparer shown ee instr.)? Yes	wn below
		, 31	Print/Type prep		ening nauch	Preparer's sig		LIN OF HOUCE	Date	ai iriStitUtilO		, PTIN	
Pa			i i i i i i i ype pref	paror o name		, ropardi s sig	natur C		Duic			IT	
	ера										If-emplo	yeu	
Us	e O	nly	Firm's name ►							Firm's EIN ▶			
			Firm's address	; >						Phone no).		

Form 1041 (2011) Page 2 Schedule A Charitable Deduction. Do not complete for a simple trust or a pooled income fund. Amounts paid or permanently set aside for charitable purposes from gross income (see instructions) . 2 2 Tax-exempt income allocable to charitable contributions (see instructions) 3 3 4 Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes 4 5 5 6 Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable 6 Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13 7 Income Distribution Deduction Schedule B 1 2 2 Total net gain from Schedule D (Form 1041), line 15, column (1) (see instructions) 3 3 4 Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion) 4 Capital gains for the tax year included on Schedule A, line 1 (see instructions) 5 5 Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss 6 6 7 Distributable net income. Combine lines 1 through 6. If zero or less, enter -0- 7 8 If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law 8 9 9 10 10 11 Total distributions. Add lines 9 and 10. If greater than line 8, see instructions 11 12 12 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 Schedule G Tax Computation (see instructions) Tax: a Tax on taxable income (see instructions) 1a **b** Tax on lump-sum distributions. Attach Form 4972 1b c Alternative minimum tax (from Schedule I (Form 1041), line 56) 1c 1d Foreign tax credit. Attach Form 1116 2a General business credit. Attach Form 3800 2b Credit for prior year minimum tax. Attach Form 8801 3 3 4 4 5 Recapture taxes. Check if from: Form 4255 Form 8611 5 Household employment taxes. Attach Schedule H (Form 1040) 6 6 Total tax. Add lines 4 through 6. Enter here and on page 1, line 23 Other Information Yes No Did the estate or trust receive tax-exempt income? If "Yes." attach a computation of the allocation of expenses 1 Enter the amount of tax-exempt interest income and exempt-interest dividends ▶ \$ Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any 2 3 At any time during calendar year 2011, 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 Form TD F 90-22.1. If "Yes," enter the name of the foreign country During the tax year, did the estate or trust receive a distribution from, or was it the grantor of, or transferor to, a

Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see

To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here (see instructions) . . . \blacktriangleright

5

6

7 8