



National Association of Tax Professionals

Addendum: Introduction to Trusts and Form 1041

Revision 1

Page 150-151

The interest and dividend numbers were changed to reflect the amounts in the table on Page 142.

661117
OMB No. 1545-0092

Final K-1 Amended K-1

Schedule K-1 (Form 1041) 2023
Department of the Treasury
Internal Revenue Service

For calendar year 2023, or tax year

beginning _____ ending _____

Beneficiary's Share of Income, Deductions, Credits, etc.
See back of form and instructions.

Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items	
1 Interest income	11 Final year deductions
2a Ordinary dividends	
2b Qualified dividends	
3 Net short-term capital gain	
4a Net long-term capital gain	
4b 30% rate gain	12 Alternative minimum tax adjustment
4c Unrecaptured section 1250 gain	
5 Other portfolio and nonbusiness income	
6 Ordinary business income	
7 Net rental real estate income	13 Credits and credit recapture
8 Other rental income	
9 Directly apportioned deductions	
	14 Other information
10 Estate tax deduction	

Part I Information About the Estate or Trust

A Estate's or trust's employer identification number
-*3131

B Estate's or trust's name
Anna Versary Family Trust

C Beneficiary's name, address, city, state, and ZIP code
**Thomas Trustworthy
123 Hill Street
Anytown WI 54111**

D Check if Form 1041-1 was filed and enter the date it was filed _____

E Check if this is the final Form 1041 for the estate or trust

Part II Information About the Beneficiary

F Beneficiary's identifying number
***-**-6789

G Beneficiary's name, address, city, state, and ZIP code
**Veracity Versary
456 Valley Road
Anytown WI 54111**

H Domestic beneficiary Foreign beneficiary

For IRS Use Only

*See attached statement for additional information.
Note: A statement must be attached showing the beneficiary's share of income and directly apportioned deductions from each business, rental real estate, and other rental activity.

12,600
444
1,000
28,400STMT

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. www.irs.gov/Form1041
Schedule K-1 (Form 1041) 2023

Anna Versary Family Trust **-***3131 FYE: 12/31/2023	Federal Statements Veracity Versary ***-**-6789	
<u>Schedule K-1, Box 14, Code E - Net Investment Income Information</u>		
Description	Amount	
Interest Income	\$ 1,623	
Dividend Income	26,777	
	\$ 28,400	

Date of revision: 07-01-24