

TLS, have you transmitted all R text files for this cycle update?

I.R.S. SPECIFICATIONS TO BE REMOVED BEFORE PRINTING
INSTRUCTIONS TO PRINTERS
SCHEDULE J (FORM 1041), PAGE 1 of 2
MARGINS: TOP 1/2", CENTER SIDES.
PAPER: WHITE, WRITING, SUB. 20.
FLAT SIZE: 8 1/2" x 11"
PERFORATE: (NONE)
PRINTS: HEAD TO HEAD
INK: BLACK
DO NOT PRINT — DO NOT PRINT — DO NOT PRINT — DO NOT PRINT

Table with 3 columns: Action, Date, Signature. Rows include O.K. to print and Revised proofs requested.

APPROVED AS IS
JC 11/10/2007

Cumulative Changes/OMB copy
Yellow highlights show changed information; Blue arrows are ref. checks.

SCHEDULE J (Form 1041)

Accumulation Distribution for Certain Complex Trusts

OMB No. 1545-0092

2007

Department of the Treasury Internal Revenue Service

Attach to Form 1041.

See the Instructions for Form 1041.

Name of trust

Employer identification number

Part I Accumulation Distribution in 2007

Note: See the Form 4970 instructions for certain income that minors may exclude and special rules for multiple trusts.

Table with 5 rows for accumulation distribution in 2007, including lines 1 through 5.

Part II Ordinary Income Accumulation Distribution (Enter the applicable throwback years below.)

Note: If the distribution is thrown back to more than five years (starting with the earliest applicable tax year beginning after 1968), attach additional schedules. (If the trust was a simple trust, see Regulations section 1.665(e)-1A(b).)

Table with 17 rows for ordinary income accumulation distribution, including lines 6 through 17.

Part III Taxes Imposed on Undistributed Net Income (Enter the applicable throwback years below.) (See page 45 of the instructions.)
Note: If more than five throwback years are involved, attach additional schedules. If the trust received an accumulation distribution from another trust, see Regulations section 1.665(d)-1A.

Table with 6 columns: Description, Throwback year ending, Throwback year ending, Throwback year ending, Throwback year ending, Throwback year ending. Rows 18-31. Includes instructions for each line and a large 'Draft as of 10/11/2007' watermark.

Part IV Allocation to Beneficiary

Note: Be sure to complete Form 4970, Tax on Accumulation Distribution of Trusts.

Form with fields for Beneficiary's name, identifying number, address, city/state/zip, and throwback years 32-37.