

Form **1041** U.S. Income Tax Return for Estates and Trusts **2009**

Department of the Treasury—Internal Revenue Service

OMB No. 1545-0092

A Type of entity (see instr.): For calendar year **2009** or fiscal year beginning _____, **2009**, and ending _____, 20____

Decedent's estate
 Simple trust
 Complex trust
 Qualified disability trust
 ESBT (S portion only)
 Grantor type trust
 Bankruptcy estate—Ch. 7
 Bankruptcy estate—Ch. 11
 Pooled income fund

Name of estate or trust (If a grantor type trust, see page 14 of the instructions.)
 Name and title of fiduciary
 Number, street, and room or suite no. (If a P.O. box, see page 14 of the instructions.)
 City or town, state, and ZIP code

C Employer identification number
D Date entity created
E Nonexempt charitable and split-interest trusts, check applicable boxes (see page 15 of the instr.): 16

Described in section 4947(a)(1)
 Not a private foundation
 Described in section 4947(a)(2)

B Number of Schedules K-1 attached (see instructions) **F** Check applicable boxes:

Initial return Final return Amended return
 Change in fiduciary Change in fiduciary's name Change in fiduciary's address

G Check here if the estate or filing trust made a section 645 election.

Income	1 Interest income	1	
	2a Total ordinary dividends	2a	
	b Qualified dividends allocable to: (1) Beneficiaries (2) Estate or trust		
	3 Business income or (loss). Attach Schedule C or C-EZ (Form 1040)	3	
	4 Capital gain or (loss). Attach Schedule D (Form 1041)	4	
	5 Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 1040)	5	
	6 Farm income or (loss). Attach Schedule F (Form 1040)	6	
	7 Ordinary gain or (loss). Attach Form 4797	7	
	8 Other income. List type and amount	8	
9 Total income. Combine lines 1, 2a, and 3 through 8	9		
Deductions	10 Interest. Check if Form 4952 is attached <input type="checkbox"/>	10	
	11 Taxes	11	
	12 Fiduciary fees	12	
	13 Charitable deduction (from Schedule A, line 7)	13	
	14 Attorney, accountant, and return preparer fees	14	
	15a Other deductions not subject to the 2% floor (attach schedule)	15a	
	b 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)	18	
	19 Estate tax deduction including certain generation-skipping taxes (attach computation)	19	
20 Exemption	20		
21 Add lines 18 through 20	21		
Tax and Payments	22 Taxable income. Subtract line 21 from line 17. If a loss, see page 23 of the instructions	22	
	23 Total tax (from Schedule G, line 7)	23	
	24 Payments: a 2009 estimated tax payments and amount applied from 2008 return	24a	
	b Estimated tax payments allocated to beneficiaries (from Form 1041-T)	24b	
	c Subtract line 24b from line 24a	24c	
	d Tax paid with Form 7004 (see page 24 of the instructions)	24d	
	e Federal income tax withheld. If any is from Form(s) 1099, check <input type="checkbox"/>	24e	
	Other payments: f Form 2439 _____; g Form 4136 _____; Total	24h	
	25 Total payments. Add lines 24c through 24e, and 24h	25	
26 Estimated tax penalty (see page 24 of the instructions)	26		
27 Tax due. If line 25 is smaller than the total of lines 23 and 26, enter amount owed	27		
28 Overpayment. If line 25 is larger than the total of lines 23 and 26, enter amount overpaid	28		
29 Amount of line 28 to be: a Credited to 2010 estimated tax b Refunded	29		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here Signature of fiduciary or officer representing fiduciary Date EIN of fiduciary if a financial institution

May the IRS discuss this return with the preparer shown below (see instr.)? Yes No

Paid Preparer's Use Only Preparer's signature Date Check if self-employed Preparer's SSN or PTIN

Firm's name (or yours if self-employed), address, and ZIP code EIN Phone no.

Schedule A Charitable Deduction. Do not complete for a simple trust or a pooled income fund.

Table with 7 rows for Schedule A Charitable Deduction. Line 6 is highlighted with a red box containing '26'.

Schedule B Income Distribution Deduction

Table with 15 rows for Schedule B Income Distribution Deduction. Line 7 is highlighted with a red box containing '27'.

Schedule G Tax Computation (see page 27 of the instructions)

Table with 7 rows for Schedule G Tax Computation. Sub-rows 1a-1d, 2a-2d, and 3 are included.

Other Information

Table with 9 rows for Other Information. Includes questions about tax-exempt income, foreign trusts, and qualified residence interest.