



Note: *The draft you are looking for begins on the next page.*

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This is an early release draft of an IRS tax form, instructions, or publication, which the IRS is providing for your information. **Do not file draft forms** and do **not** rely on draft forms, instructions, and pubs for filing. We incorporate all significant changes to forms posted with this coversheet. However, unexpected issues occasionally arise, or legislation is passed—in this case, we will post a new draft of the form to alert users that changes were made to the previously posted draft. Thus, there are never any changes to the last posted draft of a form and the final revision of the form. Forms and instructions are subject to OMB approval before they can be officially released, so we post drafts of them until they are approved. Drafts of instructions and pubs usually have some additional changes before their final release. Early release drafts are at [IRS.gov/DraftForms](https://www.irs.gov/DraftForms) and remain there after the final release is posted at [IRS.gov/LatestForms](https://www.irs.gov/LatestForms). Also see [IRS.gov/Forms](https://www.irs.gov/Forms).

Most forms and publications have a page on IRS.gov: [IRS.gov/Form1040](https://www.irs.gov/Form1040) for Form 1040; [IRS.gov/Pub501](https://www.irs.gov/Pub501) for Pub. 501; [IRS.gov/W4](https://www.irs.gov/W4) for Form W-4; and [IRS.gov/ScheduleA](https://www.irs.gov/ScheduleA) for Schedule A (Form 1040), for example, and similarly for other forms, pubs, and schedules for Form 1040. When typing in a link, type it into the address bar of your browser, not a Search box on IRS.gov.

If you wish, you can submit comments to the IRS about draft or final forms, instructions, or pubs at [IRS.gov/FormsComments](https://www.irs.gov/FormsComments). Include “NTF” followed by the form or pub number (for example, “NTF1040”, “NTFW4”, “NTF501, etc.) in the body of the message to route your message properly. We cannot respond to all comments due to the high volume we receive and may not be able to consider many suggestions until the subsequent revision of the product, but we will review each “NTF” message. If you have comments on reducing paperwork and respondent (filer) burden, with respect to draft or final forms, please respond to the relevant information collection through the Federal Register process; for more info, click [here](#).

For calendar year 2023 or short year beginning _____, 2023, and ending _____, 2023.

Part I General Information

1 Name of trust or other entity filing return _____ **2** Employer identification number (EIN) _____

3a Name and title of trustee _____

3b Number, street, and room or suite no. (If a P.O. box, see the instructions.) _____

3c City or town, state, and ZIP code _____ **4** Number of QFTs included on this return _____

5 Check applicable boxes:
 Initial return Amended return Final return Change in the fiduciary or fiduciary's name Change in fiduciary's address

Part II Tax Computation

Income	1a Interest income	1a
	b Tax-exempt interest. Don't include on line 1a	1b
	2a Total ordinary dividends	2a
	b Qualified dividends	2b
	3 Capital gain or (loss) (attach Schedule D (Form 1041))	3
4 Other income. List type and amount	4	
5 Total income. Combine lines 1a, 2a, 3, and 4	5	
Deductions	6 Taxes	6
	7 Trustee fees	7
	8 Attorney, accountant, and return preparer fees	8
	9 Other deductions	9
10 Total deductions. Add lines 6 through 9	10	
Tax and Payments	11 Taxable income. Subtract line 10 from line 5	11
	12 Tax. (If this is a composite return, check here <input type="checkbox"/>)	12
	13 Credits (see instructions). Specify the credits claimed	13
	14 Subtract line 13 from line 12	14
	15 Net Investment Income Tax from Form 8960, line 21	15
	16 Total tax. Add lines 14 and 15	16
	17 Payments (see instructions)	17
	18 Elective payment election amount from Form 3800	18
	19 Tax due. If the total of lines 17 and 18 is smaller than line 16, enter amount owed	19
	20 Overpayment. If the total of lines 17 and 18 is larger than line 16, enter amount overpaid	20
	21 Amount of line 20 to be: a Credited to 2024 estimated tax b Refunded	21

Sign Here 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 trustee) is based on all information of which preparer has any knowledge.

Signature of trustee or officer representing trustee _____ Date _____

May the IRS discuss this return with the preparer shown below? See instr. Yes No

Paid Preparer Use Only

Print/Type preparer's name _____ Preparer's signature _____ Date _____ Check if self-employed PTIN _____

Firm's name _____ Firm's EIN _____

Firm's address _____ Phone no. _____