

Trust/Estates Tax Return Statement

General Information

Tax Year: 2023
Name of Trust/Estate: Sample Family Trust
Trust/Estate Identification Number: 12-3456789
Fiduciary Name: Jane Doe, Trustee
Address: 123 Main Street, Anytown, State ZIP
Filing Date: 2024-03-15

Summary of Income

Description	Amount
Interest Income	\$2,500.00
Dividend Income	\$3,200.00
Capital Gains	\$5,000.00
Other Income	\$1,200.00
Total Income	\$11,900.00

Summary of Deductions

Description	Amount
Trustee Fees	\$500.00
Attorney/Accounting Fees	\$800.00
Charitable Contributions	\$600.00
Other Deductions	\$200.00
Total Deductions	\$2,100.00

Tax Calculation

Taxable Income: \$9,800.00
Tax Liability: \$1,500.00
Federal Taxes Paid: \$1,200.00
Balance Due / (Refund): \$300.00

Distribution to Beneficiaries

Beneficiary Name	Share (%)	Amount Distributed
John Doe	50%	\$4,900.00
Sarah Smith	50%	\$4,900.00

Important Notes

- This statement is a sample format for informational purposes only.
- All income, deductions, and distributions must be reported accurately.
- Attach supporting documents as required by the tax authority.
- The fiduciary is responsible for the timely filing and accuracy of the tax return.
- Consult a qualified tax professional for guidance specific to your trust or estate.