

State of Rhode Island Division of Taxation

2022 RI-1041

Fiduciary Income Tax Return



22101799990101

You <u>must</u> check a box: <input type="checkbox"/> Estates and Trusts <input type="checkbox"/> Bankruptcy Estate <input type="checkbox"/> Amended Return	Name of estate or trust			Federal employer identification number		
	Name and title of fiduciary					
	Address 1					
	Address 2					
	City, town or post office		State	ZIP code	E-mail address	

Year End Calendar Year: 01/01/2022 through 12/31/2022 Fiscal Year: beginning MM/DD/2022 through MM/DD/2023

Income	1	Federal total income of fiduciary from Federal Form 1041, line 9.....	1		
	2	Modifications increasing federal total income from Schedule M, line 2l..	2		
	3	Modifications decreasing federal total income from Schedule M, line 1w	3		
	4	Net modifications. Combine lines 2 and 3	4		
	5	Modified federal total income. Combine lines 1 and 4 (add net increases or subtract net decreases)	5		
	6	Federal total deductions from Federal Form 1041, lines 16 and 22 (see instructions)	6		
	7	RI taxable income. Subtract line 6 from line 5	7		
Tax and Credits	8	Rhode Island income tax from RI-1041 Tax Computation Worksheet	8		
	9	Allocation. Enter amount from page 2, line 34 (resident estate or trusts enter 1.0000)	9		
	10	Rhode Island income tax after allocation. Multiply line 8 by line 9.....	10		
	11	Credit for income taxes paid to other states from pg 2, line 41 (resident only)...	11		
	12	Other Rhode Island credits from Schedule CR, line 9	12		
	13	Total Rhode Island credits. Add lines 11 and 12	13		
	14a	Rhode Island income tax after RI credits. Subtract line 13 from line 10 (not less than zero)	14a		
	b Recapture of Prior Year Other Rhode Island Credits from Schedule CR, line 12.....	14b			
	c Electing Small Business Trust Tax. (see instructions).....	14c			
	d TOTAL RHODE ISLAND TAX. Add lines 14a, 14b and 14c.....	14d			
Payments	15a	Rhode Island 2022 income tax withheld from Schedule W, line 16 All Forms W-2 and 1099 with RI withholding AND Schedule W must be attached.	15a		
	b	Payments on 2022 Form RI-1041ES and credits carried forward from 2021	15b		
	c	Nonresident real estate withholding (nonresident estate or trust only)	15c		
	d	Other payments	15d		
	e	Total payments. Add lines 15a, 15b, 15c and 15d.....	15e		
Amount Due	16a	TAX DUE. If line 14d is larger than line 15e, SUBTRACT line 15e from line 14d.	16a		
	b	Enter underestimating interest due. Add to line 16a or subtract from line 17...	16b		
	c	TOTAL AMOUNT DUE. Add lines 16a and 16b.....	16c		
Refund	17	If line 15e is larger than line 14d, SUBTRACT line 14d from 15e. This is the amount you overpaid. If there is an amount due for underestimating interest on line 16b, subtract line 16b from line 17.....	17		
	18	Amount of overpayment to be refunded.....	18		
	19	Amount of overpayment to be applied to 2023 estimated tax	19		

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

Authorized officer signature	Print name	Date	Telephone number
Paid preparer signature	Print name	Date	Telephone number
Paid preparer address	City, town or post office	State	ZIP Code
			PTIN

May the Division of Taxation contact your preparer? YES



Name of estate or trust	Federal employer identification number

SCHEDULE I BENEFICIARY INFORMATION (All estates and trusts must complete this schedule)

	Name	Address	State of Residence	Social Security Number
20	Beneficiary			
21	Beneficiary			
22	Beneficiary			

If more space is needed, please attach the required information on a separate sheet of paper.

SCHEDULE II ALLOCATION AND MODIFICATION (To be completed by trusts and estates with nonresident beneficiaries)

		Column A	Column B	Column C	Column D	Column E	
		Percent of beneficiaries' interest (must equal 100%)	Column A times total federal income page 1, line 1	Column A times total net modifications page 1, line 4	Combine Columns B and C. (add net increases or subtract net decreases.)	Residents enter amount from col D. Nonresidents enter RI source income from col B.	
			Total Federal Income	Modifications to Federal Income	Modified Federal Income	Total RI Source Income	
Resident Beneficiaries	23	Beneficiary ...					
	24	Beneficiary ...					
	25	Beneficiary ...					
	26	Beneficiary ...					
Nonresident Beneficiaries	27	Beneficiary....					
	28	Beneficiary ...					
	29	Beneficiary ...					
	30	Beneficiary.....					
31	Total	100%					
32	Modifications to Rhode Island source income. Enter amount from column C that is included in column E					32	
33	Modified Rhode Island source income. Combine lines 31, col E and 32 (add net increases - subtract net decreases)					33	
34	RI allocation. Divide line 33 by line 31, col D (not greater than 1.000). Enter here and on RI-1041, page 1, line 9..					34	_____

SCHEDULE III CREDIT FOR INCOME TAXES PAID TO ANOTHER STATE (resident estates or trusts only)

35	Rhode Island income tax from page 1, line 8	35	
36	Income from other state. If more than one state, see instructions.....	36	
37	Modified federal total income from page 1, line 5.....	37	
38	Divide line 36 by line 37	38	_____
39	Multiply line 35 by line 38	39	
40	Tax due and paid to other state Insert abbreviation for name of state paid	40	
41	Maximum tax credit (line 35, 39 or 40, whichever is the SMALLEST). Enter here and on RI-1041, page 1, line 11.	41	