

Amended return



Form 41

Oregon Fiduciary Income Tax Return

Tax year 2015

For office use only. Date received, Payment, Penalty date, Federal employer identification number (FEIN) of trust or estate, Oregon business identification number (BIN), Extension to file, Form 24 is included.

or Fiscal year Month Day Year beginning: Ending: Month Day Year

Name of trust or estate, Name of fiduciary, Title (TTEE or PR), Street address or PO Box, City, State, ZIP code, A. Check only one box, B. This is, C. Check one box, D. If exempt organization.

Include a copy of federal Form 1041, Schedule K-1s, applicable schedules, 1099 and W-2 (Round to nearest dollar)

Table with 2 columns: Beneficiary column, Fiduciary column. Rows 1-21 detailing tax calculations: Revised distributable net income, Distribution deduction, Percentage, Revised taxable income, Fiduciary adjustment, Income to be reported by beneficiaries, Oregon taxable income, Tax using rate schedule, NLTCG, Total tax, Tax credits, Balance of tax, Oregon income tax withheld, Payments with OR-18 or OR-19, Payments and claim of right credit, Total payments, Tax due, Overpayment, Penalty for filing or paying late, Interest due, Total due, Refund.

Donation: Oregon surplus credit (kicker). If you elect to donate your kicker to the State School Fund, check the box and write the amount of the kicker calculation here: This election is irrevocable.

Name of estate or trust

FEIN



00471501020000

Schedule 1—Oregon changes to distributable net income (DNI) and taxable income of fiduciary (TIF) (see instructions)

Table with 2 columns: (Column A) DNI and (Column B) TIF. Rows include: 22. Distributable net income (from federal Form 1041, Schedule B, line 7); 23. Taxable income of fiduciary (from federal Form 1041, line 22); 24. Difference in depreciation for Oregon; 25. Other changes; 26. Line 24 plus line 25; 27. Revised distributable net income; 28. Total taxable income; 29. Changes included on column A, line 26, that were distributed; 30. Revised taxable income of fiduciary.

Schedule 2—Fiduciary adjustment (see instructions)

Table with 2 columns: Subtractions and Additions. Rows include: 31. 2015 federal income tax subtraction—limited to \$6,450; 32. Interest on U.S. obligations; 33. Oregon income tax refund; 34. Other subtractions; 35. Add lines 31 through 34; 36. Oregon income tax deducted; 37. Interest on obligations of other states; 38. Depletion in excess of adjusted basis; 39. Estate taxes; 40. Other additions; 41. Add lines 36 through 40; 42. Fiduciary adjustment (difference between lines 35 and 41). Includes checkboxes for 'added or subtracted'.

2015 rate schedule—compute the tax using the following rates (see instructions)

Table with 2 columns: If your taxable income is: and Your tax is:. Rows include: Not over \$3,350 (5% of taxable income); Over \$3,350 but not over \$8,400 (\$168 plus 7% of the excess over \$3,350); Over \$8,400 but not over \$125,000 (\$521 plus 9% of the excess over \$8,400); Over \$125,000 (\$11,015 plus 9.9% of the excess over \$125,000).

Under penalty of false swearing, I declare that the information in this return and any included forms or statements is true, correct, and complete.

Signature of fiduciary (with 'X' mark), Print name, Date, Title (if applicable), Daytime phone.

Check the box to authorize the following individual(s) to receive and provide confidential tax information relating to this return.

Preparer's information form including: Preparer's name (print), Title, License number, Preparer's mailing address, City, State, ZIP code, Signature of preparer (with 'X' mark), Phone, Date.

Mail to: Oregon Department of Revenue, PO Box 14110, Salem OR 97309-0910.