0904310059

PA SCHEDULE A/B/J

Interest and Dividend Income
Income from Estates and Trusts

PA-41 A/B/J (09–09) (FI)
PA Department of Revenue **2009**

OFFICIAL USE ONLY

If you need more space, you may photocopy these schedules.

START →

Name as shown on the PA-41	Federal EIN or Decedent's SSN

Caution: Federal and PA rules for taxable interest and dividend income are different. You cannot use the federal schedules to report PA interest or dividend income. **Read the instructions.** If either the taxable interest or dividend income is $2,500 or less, the fiduciary must report the income, but need not submit any schedule. If either the interest income or dividend income is more than $2,500, the fiduciary must submit a schedule. List the name of each payer and the amount of PA taxable interest and dividend income you received in 2009.

PA-41 A (09-09) (FI)

PA SCHEDULE A - PA Taxable Interest Income

1.	1.	$
		$
		$
		$
		$
		$
		$
		$
2. Total Interest Income. Add all amounts listed (including amounts on additional schedules).	2.	$
3. Interest income from partnership(s), from PA Schedule(s) RK-1.	3.	$
4. Interest income from PA S corporation(s), from PA Schedule(s) RK-1.	4.	$
5. Total PA Taxable Interest Income. Add Lines 2, 3 and 4. Enter on Line 1 of the PA-41.	5.	$

IMPORTANT: Capital gains distributions are dividend income for PA purposes.

PA-41 B (09-09) (FI)

PA SCHEDULE B – PA Taxable Dividend Income & Capital Gains Distributions

1.	1.	$
		$
		$
		$
		$
		$
		$
		$
		$
2. Total Dividend Income. Add all amounts listed (including amounts on additional schedules).	2.	$
3. Capital Gains Distributions.	3.	$
4. Dividend income from partnership(s), from PA Schedule(s) RK-1.	4.	$
5. Dividend income from PA S corporation(s), from PA Schedule(s) RK-1.	5.	$
6. Total PA Taxable Dividend Income. Add Lines 2, 3, 4 and 5. Enter on Line 2 of the PA-41.	6.	$

PA-41 J (09-09) (FI)

PA SCHEDULE J – Income from Estates or Trusts **2009**

List the name, address, and identification number of each other estate or trust of which this estate or trust is a beneficiary. If this estate or trust received a Federal 1041 Schedule K-1 instead of a PA Schedule RK-1 or NRK-1, see the instructions. Check box if income is reported from PA Schedule RK-1 or NRK-1.

(a) Name and address of each estate or trust	PA Schedule RK-1 or NRK-1	(b) Federal EIN	(c) Income Amount
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
Estate or trust income from partnership(s).			
Estate or trust income from PA S corporation(s).			

Total Estate or Trust Income.
Add Column (c). Enter on Line 6 of the PA-41. . . . . .

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