

**PA-41 - 2004** (09-04)  
**PA Fiduciary Income Tax Return**  
 PA Department of Revenue  
 Harrisburg, PA 17128-0413  
**PLEASE PRINT IN BLACK INK**

0400510053

OFFICIAL USE ONLY

Federal Employer Identification Number

Decedent's Social Security Number

Daytime Telephone Number

PLEASE WRITE IN THE EIN & SOCIAL SECURITY NUMBER ABOVE

Name of Estate or Trust (See Instructions)

Name and Title of Fiduciary

Address (Street Number and Name, etc.)

City or Post Office

State

ZIP Code

PLACE LABEL HERE

**Extension Enclosed.**

**Amended PA-41.** If filing an amended return, fill in this oval.

**Fiscal Year Filer.** Fill in this oval.  
 FY beginning \_\_\_\_\_ 04  
 and ending \_\_\_\_\_

**Residency Status.** Fill in only one oval.

**R** Pennsylvania Resident

**N** Nonresident  
 If "N", Name of State \_\_\_\_\_

**Final Return.**

**F** Enter Ending Date:  
 \_\_\_\_\_

**Do You Want a 2005 PA-41 Booklet?**  
**NO** Fill in this oval completely if you do not want a 2005 PA-41 Tax Booklet.

**Estate or Trust Identification Change.** Fill in this oval if any of the identification or filing information you entered is different from the 2003 PA-41, or if the estate or trust did not file a 2003 PA-41.

Submit all required Pennsylvania supporting schedules.

If Line 3, 4, or 5 is a LOSS, fill in the oval next to the amount.



Dollars

Cents

- 1. **PA TAXABLE INTEREST INCOME.** ..... 1.
- 2. **PA TAXABLE DIVIDEND INCOME.** ..... 2.
- 3. **NET INCOME or LOSS from the Operation of a Business, Profession, or Farm.** LOSS .....  3.
- 4. **NET GAIN or LOSS from the Sale, Exchange, or Disposition of Property.** LOSS .....  4.
- 5. **NET INCOME or LOSS from Rents, Royalties, Patents, or Copyrights.** LOSS .....  5.
- 6. **ESTATE or TRUST INCOME.** ..... 6.
- 7. **TOTAL TAXABLE INCOME.** Add only the positive **income** from Lines 1, 2, 3, 4, 5, and 6.  
 Do not add losses. .... 7.
- 8. **DEDUCTIONS from PA SCHEDULE DD.** ..... 8.
- 9. **NET PA TAXABLE INCOME.** Subtract Line 8 from Line 7. .... 9.
- 10. **TOTAL PA TAX LIABILITY.** Multiply Line 9 by the tax rate 3.07% (0.0307) . .... 10.
- 11. **2004 ESTIMATED PAYMENTS and CREDITS.** ..... 11.
- 12. **TOTAL CREDIT for TAXES PAID by PA RESIDENT ESTATES or TRUSTS to OTHER STATES or COUNTRIES.** ..... 12.
- 13. **TOTAL OTHER CREDITS from PA Schedule OC.** ..... 13.
- 14. **2004 PAYMENTS and CREDITS.** Add Lines 11, 12, and 13. .... 14.
- 15. **TAX DUE.** Line 10 is more than Line 14. .... 15.

EC

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Name as shown on PA-41

Federal EIN or Decedent's Social Security Number

16. **PENALTIES AND INTEREST.** Fill in oval if Form 1630 is attached .....  16.

17. **TOTAL PAYMENT** – Add Lines 15 and 16. Make check or money order payable to **PA DEPT. OF REVENUE. Use your PA-V form.** See the instructions on **HOW TO PAY.** . . . 17.

18. **OVERPAYMENT.** Line 14 is more than Line 10 plus Line 16. Enter the difference here. . . . 18.  
**The total of Lines 19 and 20 must equal Line 18.**

19. **REFUND** – AMOUNT of LINE 18 you want as a check mailed to the estate or trust. . . . **REFUND** 19.

20. **CREDIT** – AMOUNT of LINE 18 you want as a credit to the 2005 Estimated Tax Account of the estate or trust. . . . 20.

Signature(s). Under penalties of perjury, I have examined this return, including all accompanying schedules and statements, and to the best of my belief, it is true, correct and complete.

Signature of Fiduciary

Date

Name of preparer or his or her company name, based on all information on this return of which the preparer has any knowledge.

Preparer or Company Name (Please Print)

Date

Telephone Number

PA-41 Other Credits (09-04)

**PA SCHEDULE OC**  
**Other Credits for Pennsylvania Fiduciary Income Tax Purposes**

**2004**

1. **PA Employment Incentive Payments Credit.** Submit **PA Schedule(s) W** or **PA Schedule RK-1** or **NRK-1.** . . . . . 1.
2. **PA Jobs Creation Tax Credit.** Submit the Certificate of Credit from the PA Department of Community and Economic Development or **PA Schedule RK-1** or **NRK-1.** . . . . . 2.
3. **PA Research and Development Tax Credit.** Submit the Certificate of Credit from the PA Department of Revenue or **PA Schedule RK-1** or **NRK-1.** . . . . . 3.
4. **PA Film Production Tax Credit.** Submit the Certificate of Credit from the PA Department of Revenue or **PA Schedule RK-1** or **NRK-1.** . . . . . 4.
5. **Total PA Other Credits.** Add Lines 1 through 4. Enter here and on Line 13 of **PA-41.** . . . . . 5.

<b>PA SCHEDULE L</b>		<b>BENEFICIARIES SHARE OF INCOME</b>				
Be sure to provide beneficiaries with their PA taxable income on a PA Schedule L. Do not use Federal Schedule K-1 for Pennsylvania purposes.						
Submit additional list(s) of beneficiaries if needed.						
Name of Each Beneficiary	Enter each beneficiary's complete address: Street or Mailing Address			Beneficiary's Federal EIN or Individual SSN	Taxable Income to PA Residents	Taxable Income to Nonresidents
	City	State	ZIP Code			
1.						
2.						
3.						
4.						
5.						
Add amounts in each column and enter totals here.						