

**PA SCHEDULE A & B**  
**Interest and Dividend Income**  
PA-41 A/B (09-02) (I)  
PA Department of Revenue **2002**

OFFICIAL USE ONLY

If you need more space, you may photocopy these schedules or prepare your own schedules in these formats.

Name as shown on the PA-41	Federal EIN or Decedent's SSN: -
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**Caution.** Federal and PA rules for taxable interest and dividend income are different. **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. Select the appropriate Filing Option. If using the federal amount on Line 1, make the required corrections for PA purposes, and explain them in the space under Filing Option 3.

- Filing options:**
1. Submit a copy of your federal schedule — not this schedule.
  2. Enter the federal taxable interest and/or dividend income — do not submit the federal schedule.
  3. List the name of each payer and the amount of PA taxable interest and dividend income you received in 2002.

**PA Schedule A - PA Taxable Interest Income**

<b>Filing option 2.</b> Enter the amount from the federal schedule.	\$	
<b>Filing option 3.</b> PA Taxable Interest Income. <b>Read the instructions.</b>		
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
<b>1. Total Interest Income.</b> Add all amounts listed (including amounts on additional schedules).	1. \$	
<b>2.</b> Interest income from partnership(s), from <b>PA Schedule(s) RK-1.</b>	2. \$	
<b>3.</b> Interest income from PA S corporation(s), from <b>PA Schedule(s) RK-1.</b>	3. \$	
<b>4. Total PA Taxable Interest Income.</b> Add Lines 1, 2, and 3. Include on Line 1 of the PA-41.	4. \$	

**IMPORTANT. Capital gain distributions are dividend income for PA purposes.**

**PA Schedule B – PA Taxable Dividend Income**

<b>Filing option 2.</b> Enter the amount from the federal schedule.	\$	
<b>Filing option 3.</b> PA Taxable Dividend Income. <b>Read the instructions.</b>		
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
<b>1. Total Dividend Income.</b> Add all amounts listed (including amounts on additional schedules).	1. \$	
<b>2.</b> Dividend income from partnership(s), from <b>PA Schedule(s) RK-1.</b>	2. \$	
<b>3.</b> Dividend income from PA S corporation(s), from <b>PA Schedule(s) RK-1.</b>	3. \$	
<b>4. Total PA Taxable Dividend Income.</b> Add Lines 1, 2, and 3. Include on Line 2 of the PA-41.	4. \$	

PA-41 J (09-02) **PA SCHEDULE J – Income from Estates or Trusts** **2002**

**Read the instructions.** 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 Schedule K-1, instead of a PA Schedule L, see the instructions.

(a) Name and address of each estate or trust	(b) Federal EIN	(c) Income Amount
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	—	
	—	
	—	

Income from partnership(s), from **PA Schedule(s) RK-1 or NRK-1.**

Income from PA S corporation(s), from **PA Schedule(s) RK-1 or NRK-1.**

**Total Estate or Trust Income.**

Add Column (c). Include on Line 6 of the **PA-41.**