

D-407 - Estates and Trusts Income Tax Return (Edition Date: 11-10-11)

NOTE: The fiscal year beginning date must have “11” hard coded for the tax year. This part of the fiscal year should be hard coded to disallow other tax years from being entered on the form.

Changes for the Year:

Tax Year references were updated throughout the form to 2011. Line reference numbers were updated to accommodate for line changes. Line geometry and barcode number were updated. The “Qualified Funeral Trust” was added under filing information. This was also added in the scanband as “QFT”.

Page 2, Schedule A, line 13, 13c and year 2010 was added. The total line is now 13d.

Requirements:

Barcode

The barcode must read 71201xx013. Replace (xx) with your two-digit Software Developer Identification Number.

Placement of the barcode: On the first page, align between Row 33, Column 75 - 79 and Row 48, Column 75 - 79. Print the number either stacked or vertically to the right of the barcode.

Line Geometry

All horizontal lines must be reproduced at the position designated on the form layout.

Placement of Variable Data

Print Line Number	Identification	Begin Print Position	Maximum Field Length	End Print Position	Field Description
7	Fiscal Year Beginning	45	8	52	Numeric; No Punctuation Starting Date. Ex. 03 01 11 11 must be hard coded
7	And Ending	65	8	72	Numeric; No Punctuation Ending Date. Ex. 02 01 12
30	Legal Name	6	4	9	Alphanumeric 1 st four characters of legal name
30	Address	13	4	16	Alphanumeric; 1 st four characters of address
30	Zip Code	20	5	24	Numeric; 5-digit zip code
30	Initial Return	28	2	29	IR
30	Initial Return	33	1	33	Alpha; Y or N Y: Yes

					N: No
30	Amended Return	37	2	38	AR
30	Amended Return	42	1	42	Alpha; Y or N Y: Yes N: No
30	Final Return	46	2	47	FR
30	Final Return	51	1	51	Alpha; Y or N Y: Yes N: No
30	NR Beneficiaries	55	3	57	NRB
30	NR Beneficiaries	61	1	61	Alpha; Y or N Y: Yes N: No
30	Qualified Funeral Trust	65	3	67	QFT
30	Qualified Funeral Trust	71	1	72	Alpha; Y or N Y: Yes N: No
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32	Name of Estate or Trust	6	40	45	Alphanumeric
32	FEIN	49	9	57	Numeric; No dashes Print number consecutively
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34	Name of Estate or Trust	6	40	45	Alphanumeric
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36	Address	6	31	36	Alphanumeric
36	Apartment Number	39	5	43	Alphanumeric
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38	City	6	18	23	Alpha
38	State	26	2	27	Alpha
38	Zip Code	30	10	39	Numeric; Print 9-digit zipcode Add (-) before 4 digit zip code
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40	Bonus Depreciation	6	2	7	BD
40	Bonus Depeciation	15	7	21	Numeric
40	Line 10	29	2	30	10
40	Line 10	35	10	44	Numeric
40	Line 16B	52	3	54	16B
40	Line 16B	58	10	67	Numeric
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42	Line 01	6	2	7	01
42	Line 01	11	11	21	Numeric; "-"
42	Line 11	29	2	30	11
42	Line 11	35	10	44	Numeric
42	Line 17	52	2	53	17
42	Line 17	58	10	67	Numeric
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44	Line 02	6	2	7	02
44	Line 02	12	10	21	Numeric
44	Line 12	29	2	30	12
44	Line 12	35	10	44	Numeric
44	Line 18	52	2	53	18
44	Line 18	58	10	67	Numeric
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46	Line 04	6	2	7	04
46	Line 04	12	10	21	Numeric
46	Line 13	29	2	30	13
46	Line 13	35	10	44	Numeric
46	Taxpayer's Number	52	2	53	TN
46	Taxpayer's Number	58	10	67	Numeric; 10 digits required
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48	Line 06	6	2	7	06
48	Line 06	11	11	21	Numeric; "-"
48	Line 15	29	2	30	15
48	Line 15	35	10	44	Numeric
48	Preparer's Number	52	2	53	PN
48	Preparer's Number	58	10	67	Numeric; 10 digits required
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50	Line 09	6	2	7	09
50	Line 09	12	10	21	Numeric
50	Line 16A	29	3	31	16A
50	Line 16A	35	10	44	Numeric
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52	Refund Due	38	10	47	Numeric
52	Payment Due	66	10	75	Numeric