

SCHEDULE I BENEFICIARY INFORMATION (All estates and trusts must complete this schedule)

	Name	Address	State of Residence	Social Security Number
25. Beneficiary				
26. Beneficiary				
27. Beneficiary				

If more space is needed, please attach the required information on a separate sheet of paper.

SCHEDULE II ALLOCATION AND MODIFICATION (To be completed by trusts and estates with nonresident beneficiaries)

	Column A	Column B	Column C	Column D	Column E
	Percent of beneficiaries' interest (must equal 100%)	Column A times total federal income page 1, line 1	Column A times total net modifications page 1, line 4	Combine Columns B and C. (add net increases or subtract net decreases.)	Residents enter amount from col D. Nonresidents enter RI source income from col B.
		Total Federal Income	Modifications to Federal Income	Modified Federal Income	Total Rhode Island Source Income
Resident Beneficiaries	28. Beneficiary				
	29. Beneficiary				
	30. Beneficiary				
	31. Beneficiary				
Nonresident Beneficiaries	32. Beneficiary				
	33. Beneficiary				
	34. Beneficiary				
	35. Beneficiary				
36. Total	100%				
37. Modifications to Rhode Island source income - Enter amount from column C that is included in column E					37.
38. Modified Rhode Island source income - combine lines 36, column E and 37 (add net increases - subtract net decreases).					38.
39. RI allocation - divide line 38 by line 36, column D (not greater than 1.000) - enter here and on RI-1041, page 1, line 14.					39.

SCHEDULE III CREDIT FOR INCOME TAXES PAID TO ANOTHER STATE

(resident estates or trusts only - a signed copy of the other state return must be attached)

40. RI income tax after allowable federal credits - page 1, line 13	40.	
41. Income from other state	41.	
42. Modified federal total income - page 1, line 5	42.	
43. Divide line 41 by line 42	43.	_____
44. Multiply line 40 by line 43	44.	
45. Tax due and paid to other state Insert name of state paid _____	45.	
46. Maximum tax credit (line 40, 44 or 45, whichever is the SMALLEST). Enter here and on RI-1041, page 1, line 16	46.	

RI SCHEDULE OT OTHER RHODE ISLAND TAXES (Tax on lump-sum distributions and recapture of federal tax credits)

47. Tax on lump-sum distributions - Federal Form 1041, Schedule G, line 1b	47.	
48. Amount of recapture of Federal tax credits - Federal Form 1041, Schedule G, line 5	48.	
49. Total - Add lines 47 and 48	49.	
50. RI percentage	50.	25%
51. Tax - Multiply line 49 by line 50 - Enter here and on RI-1041, page 1, line 8B	51.	

RI Schedule W

RHODE ISLAND W2 AND 1099 INFORMATION

2010

Name of Estate or Trust shown on Form RI-1041

Federal Identification Number

Complete the Schedule below listing all of the estate or trust's W2s and 1099s showing Rhode Island Income Tax withheld. W2s or 1099s showing Rhode Island Income Tax withheld must still be attached to the front of your return. Failure to do so may delay the processing of your return. **ATTACH THIS SCHEDULE W TO YOUR RETURN**

	Column A	Column B	Column C	Column D
	Enter "X" if form is a 1099	Employer's Name from Box C of your W2 or Payer's Name from your Form 1099	Employer's Federal ID # from Box B of your W2 or Payer's Federal ID # from Form 1099	Rhode Island Income Tax Withheld (SEE BELOW FOR BOX REFERENCES)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				

21. Total RI Income Tax Withheld - Add lines 1 through 20, Column D. Enter total here and on Page 1, Line 20A.....

22. Total Number of W2s and 1099s showing Rhode Island Income Tax Withheld

INSTRUCTIONS FOR COMPLETING SCHEDULE W

All W2s and 1099s **must still be attached** to your Rhode Island return in order to receive credit for your Rhode Island withholding tax amount.

Lines 1 - 20:

Please complete columns A, B, C and D for each W2 and 1099 showing Rhode Island withholding.

Column A: For each W2 or 1099 being entered, leave blank if the information being entered is from a W2. Enter an "X" if the information being entered is from a 1099.

Column B: For each W2 or 1099 being entered, enter the name of the employer or payer.

Column C: For each W2, enter the Employer Identification Number from box b of the W2. For each 1099, enter the payer's

Federal Identification Number.

Column D: For each W2 or 1099, enter the amount of Rhode Island withholding as shown on each form.

- Form W2 - box 17
- Form W-2G - box 14
- Form 1099-G - box 11
- Form 1099-MISC - box 16
- Form 1099-R - box 10
- Form RI 1099-PT - box 9

Line 21: Total Rhode Island Income Tax Withheld - Add the amounts from Column D, lines 1 through 20. Enter the total here and on form RI-1041, line 20A.

ATTACH THIS FORM TO YOUR RHODE ISLAND RETURN.

RI MODIFICATION SCHEDULE - RI MODIFICATIONS TO FEDERAL AGI 2010

Name of Estate or Trust shown on Form RI-1041

Federal Identification Number

NOTE: You must attach documents supporting your modification. Otherwise, the processing of your return may be delayed.

MODIFICATIONS INCREASING FEDERAL AGI	2.	A. Income from obligations of any state or its political subdivisions, other than Rhode Island under RIGL §44-30-12(1) and RIGL §44-30-12(2)	2A.		
		B. Rhode Island fiduciary adjustment as beneficiary of an estate or trust under RIGL §44-30-17	2B.		
		C. Recapture of Family Education Account modifications under RIGL §44-30-25(g)	2C.		
		D. Bonus depreciation that has been taken for federal purposes that must be added back to Rhode Island income under RIGL §44-61-1	2D.		
		E. Section 179 depreciation that has been taken for federal purposes that must be added back to Rhode Island income under RIGL §44-61-1.1	2E.		
		F. Recapture of Tuition Saving Program modifications (section 529 accounts) under RIGL §44-30-12(4)	2F.		
		G. Recapture of Historic Tax Credit or Motion Picture Production Tax Credit modifications decreasing Federal AGI previously claimed under RIGL §44-33.2-3(2) and RIGL §44-31.2-9 respectively	2G.		
		H. Recapture of Scituate Medical Savings Account modifications under RIGL §44-30-25.1(d)(3)(i)	2H.		
		I. Unemployment compensation received but not included in federal adjusted gross income under RIGL §44-30-12(b)(6)	2I.		
		J. Deduction allowed for sales tax paid in 2010 on a qualified motor vehicle purchased in 2009 as defined by IRC section 164(a)(6) under RIGL §44-30-12(b)(7)	2J.		
		K. Income from the discharge of business indebtedness deferred under the American Recovery and Reinvestment Act of 2009 under RIGL §44-66-1	2K.		
	Total modifications INCREASING Federal AGI add lines 2A through 2K			2L.	

MODIFICATIONS DECREASING FEDERAL AGI	3.	A. Income from obligations of the US government included in Federal AGI but exempt from state income taxes	3A.	
		B. Rhode Island fiduciary adjustment as beneficiary of an estate or trust under RIGL §44-30-17	3B.	
		C. Elective deduction for new research and development facilities under RIGL §44-32-1	3C.	
		D. Railroad Retirement benefits paid by the Railroad Retirement Board	3D.	
		E. Qualifying investment in a certified venture capital partnership under RIGL §44-43-2	3E.	
		F. Family Education Accounts under RIGL §44-30-25	3F.	
		G. Tuition Saving Program contributions (section 529 accounts) under RIGL §44-30-12 . Maximum modification shall not exceed \$500 (\$1,000 if filing a joint return)	3G.	
		H. Exemptions from tax on profit or gain for writers, composers and artists under RIGL §44-30-1.1	3H.	
		I. Bonus depreciation that has already been taken on the Federal return that has not yet been subtracted from Rhode Island income under RIGL §44-61-1	3I.	
		J. Section 179 depreciation that has already been taken on the Federal return that has not yet been subtracted from Rhode Island income under RIGL §44-61-1.1	3J.	
		K. Modification for performance based compensation realized by an eligible employee under the Jobs Growth Act under RIGL §42-64.11-4	3K.	
		L. Modification for exclusion for qualifying option under RIGL §44-39.3 AND modification for exclusion for qualifying securities or investment under RIGL §44-43-8	3L.	
		M. Modification for Tax Incentives for employers under RIGL §44-55-4.1	3M.	
		N. Interest on indebtedness incurred or continued to purchase or carry obligations or securities the income of which is exempt from Rhode Island personal income tax, to the extent that such interest has been deducted in determining federal adjusted gross income under RIGL §44-30-12(c)(1)	3N.	
		O. Historic Tax Credit income or Motion Picture Production Tax Credit income reported on Federal return that is tax exempt for RI purposes under RIGL §44-33.2-3(2) & §44-31.2-9(c) respectively	3O.	
		P. Active duty military pay of Nonresidents stationed in Rhode Island and income for services performed in Rhode Island by the servicemember's spouse. This modification does NOT apply to RI residents	3P.	
		Q. Scituate Medical Savings Account contributions that are taxable on the Federal Return but exempt from Rhode Island under RIGL §44-30-25.1(d)(3)(i)	3Q.	
		R. Amounts of insurance benefits for dependents and domestic partners included in Federal AGI pursuant to chapter 12 of title 36 or other coverage plan under RIGL §44-30-12(c)(6)	3R.	
		S. Modification for Organ Transplantation for specific unreimbursed expenses incurred by claimant under RIGL §44-30-12(c)(7) . This modification applies to RHODE ISLAND RESIDENTS ONLY	3S.	
		T. Modification for Resident business owner in certified enterprise zone under RIGL §42-64.3-7 . This modification applies to RHODE ISLAND RESIDENTS ONLY	3T.	
	U. Income from the discharge of business indebtedness deferred under the American Recovery and Reinvestment Act of 2009 under RIGL §44-66-1	3U.		
Total modifications DECREASING Federal AGI add lines 3A through 3U and enter as a negative amount			3V. (

RI SCHEDULE CR - OTHER RI CREDITS

2010

Name of Estate or Trust shown on Form RI-1041

Federal Identification Number

NOTE: You **must** attach proper forms and documentation with this schedule or it will delay the processing of your return. For more details on each credit, please see page I-4 of the instructions. The instructions are also available on the the tax division's website: www.tax.ri.gov

1.	RI-3468 INVESTMENT TAX CREDIT - RIGL §44-31	1.	_____
2.	RI-2880 RESIDENTIAL RENEWABLE ENERGY SYSTEM TAX CREDIT - RIGL §44-57	2.	_____
3.	RI-6324 ADULT EDUCATION TAX CREDIT - RIGL §44-46	3.	_____
4.	RI-SP01 TAX CREDIT FOR SURVIVING SPOUSE - RIGL §44-30-26	4.	_____
5.	RI-2949 JOBS TRAINING TAX CREDIT - RIGL §42-64.6	5.	_____
6.	RI-0715 HISTORIC HOMEOWNERSHIP ASSISTANCE ACT (FOR OWNERS OF HISTORIC RESIDENCES) §44-33.1	6.	_____
7.	RI-769P RESEARCH AND DEVELOPMENT FACILITIES PROPERTY CREDIT - RIGL §44-32-2	7.	_____
8.	RI-769E RESEARCH AND DEVELOPMENT FACILITIES EXPENSES - RIGL §44-32-3	8.	_____
9.	RI-2441 ADULT AND CHILD DAY CARE ASSISTANCE AND DEVELOPMENT TAX CREDIT - RIGL §44-47	9.	_____
10.	RI-ZN02 ENTERPRISE ZONE WAGE CREDIT - DISTRESSED AREAS ECONOMIC REVITALIZATION ACT RIGL §42-64.3-6 .	10.	_____
11.	RI-286B HISTORIC PRESERVATION INVESTMENT TAX CREDIT - RIGL §44-33.2	11.	_____
12.	RI-8201 MOTION PICTURE PRODUCTION COMPANY TAX CREDIT - RIGL §44-31.2	12.	_____
13.	RI-2276 TAX CREDIT FOR CONTRIBUTIONS TO SCHOLARSHIP ORGANIZATIONS - RIGL §44-62	13.	_____
14.	RI-6336 FARM TO SCHOOL INCOME TAX CREDIT - RIGL §44-30-27	14.	_____
15.	RI-4482 INCENTIVES FOR INNOVATION AND GROWTH - RIGL §44-63	15.	_____
16.	RI-5883 JUVENILE VICTIM RESTITUTION PROGRAM CREDIT - RIGL §14-1-32.1	16.	_____
17.	RI-H20 HYDROELECTRIC DEVELOPMENT TAX CREDIT - RIGL §44-30-22	17.	_____
18.	RI-7473 TAX CREDIT FOR ART - RIGL §44-30-24	18.	_____
19.	RI-7424 TAX CREDIT TO TRUST BENEFICIARY RECEIVING ACCUMULATION DISTRIBUTION - RIGL §44-30-19	19.	_____
20.	RI-AFV1 ALTERNATIVE FUELED VEHICLE AND FILLING STATION TAX CREDIT (CARRY FORWARD ONLY) RIGL §44-39.2	20.	_____
21.	RI-3675 EMPLOYMENT TAX CREDIT - RIGL §44-39.1	21.	_____
22.	RI-8227 CAPITAL INVESTMENT WAGE CREDIT - RIGL §44-43-3	22.	_____
23.	TOTAL CREDITS - Add lines 1 through 22 - enter here and on RI-1041, page 1, line 17	23.	<div style="border: 2px solid black; width: 100px; height: 30px;"></div>

Name of Estate or Trust shown on Form RI-1041

Federal Identification Number

RI SCHEDULE FT ALTERNATIVE FLAT TAX METHOD

- 1. Modified Federal income from RI-1041, page 1, line 5 less Income Distribution Deduction from Federal Form 1041, line 18.. 1.
2. RI Alternative Flat Tax rate..... 2. 6.0%
3. Flat Tax before allocation - Multiply line 1 by line 2..... 3.
4. RI allocation from RI-1041, page 1, line 14..... 4.
5. Flat Tax after allocation - Multiply line 3 by line 4..... 5.

Resident Estates and Trusts only. If you are claiming a credit for taxes paid to other state, complete lines 6 thru 9. Otherwise, enter the amount from line 5 on line 11. NOTE: You must attach a signed copy of the other state return.

- 6. Income from other state..... 6.
7. Divide line 6 by line 1..... 7.
8. Tentative credit - Multiply line 5 by line 7..... 8.
9. Tax due and paid to other state..... Insert name of state paid 9.
10. MAXIMUM credit - Line 5, 8 or 9 (whichever is the SMALLEST)..... 10.
11. RI Flat Tax after other state credit - subtract line 10 from line 5. Enter here and on RI-1041, page 1, line 19B..... 11.

ALTERNATIVE MINIMUM TAX SCHEDULE

- 1. Federal Alternative Minimum Taxable Income from Federal Form 1041, Schedule I, line 29..... 1.
2. Exemption - If line 1 is LESS than \$87,800; enter \$26,300. Otherwise, complete the Exemption Worksheet below 2.
3. Subtract line 2 from line 1..... 3.
4. If line 3 is less than \$175,000, multiply line 3 by 6.5% (.0650). Otherwise, multiply line 3 by 7% (.0700) and subtract \$875 from the result..... 4.
5. RI tax from RI-1041, page 1, line 8A..... 5.
6. RI Alternative Minimum Tax - subtract line 5 from line 4 (If zero or less, enter zero). Enter here and on RI-1041, page 1, line 9. 6.

EXEMPTION WORKSHEET for RI-1041, ALTERNATIVE MINIMUM TAX SCHEDULE, line 2

NOTE: If RI-1041, Alternative Minimum Tax Schedule, line 1 is equal to or more than \$193,000, the exemption is zero. DO NOT complete this worksheet. Instead, enter the amount from RI-1041, Alternative Minimum Tax Schedule, line 1 on RI-1041, Alternative Minimum Tax Schedule, line 3 and go to RI-1041, Alternative Minimum Tax Schedule, line 4.

- 1. Exemption amount..... 1. \$26,300
2. Alternative minimum taxable income from RI-1041, AMT Schedule page 6, line 1..... 2.
3. Phase out of exemption amount..... 3. \$87,800
4. Subtract line 3 from line 2 (If zero or less, enter zero.)..... 4.
5. Multiply line 4 by 25% (.25)..... 5.
6. EXEMPTION - subtract line 5 from line 1 (If zero or less, enter zero.) enter here and on RI-1041, Alternative Minimum Tax Schedule, page 6, line 2 6.