

Reviewer:	Liquidator:	20	GOVERNMENT OF PUERTO RICO DEPARTMENT OF THE TREASURY	20	Control Number
Field audited by:		REVOCABLE TRUST OR GRANTOR TRUST			
Date: ___/___/___		INFORMATIVE INCOME TAX RETURN			
R M N <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		CALENDAR YEAR 20___ OR TAXABLE YEAR BEGINNING ON , 20___ AND ENDING ON _____, 20___			

AMENDED RETURN

Receipt Stamp

Trust Name	Employer Identification Number
Postal Address	Industrial Code Municipal Code
Municipality Country Zip Code	Telephone Number - Extension
Location of Principal Industry or Business (Number, Street, City)	Date created
Fill in the corresponding oval, if applicable: <input type="radio"/> First Return (Submit copy of the trust deed) <input type="radio"/> Last Return	Day ___ Month ___ Year ___
	Place created

Total Forms 480.60 F	Change of address: <input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Fill in here if you derived income subject to any tax incentives act Act _____	Merchant's Registration Number
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Part I 1. Type of trust: <input type="radio"/> Revocable Trust <input type="radio"/> Grantor Trust	2. Indicate the accounting method used: <input type="radio"/> Cash <input type="radio"/> Accrual <input type="radio"/> Other _____	3. Indicate the name and address of the Trustee: _____ _____ _____
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ATTRIBUTABLE ITEMS PER CATEGORY		Amount	Tax Withheld
Part II	1. Income (or losses)		
	A) Total distributions from qualified retirement plans (Schedule D Individual, Part IV, line 25) (1A)	00	00
	B) Gain (or loss) on the sale or exchange of short-term capital assets (Schedule D Individual, Part I, line 7) (1B)	00	
	C) Gain (or loss) on the sale or exchange of long-term capital assets (Schedule D Individual, Part II, line 17) (1C)	00	
	D) Gain (or loss) on the sale or exchange of long-term capital assets realized under special legislation (Schedule D Individual, Part III, lines 18 through 20, as applicable) (1D)	00	
	E) Interests on deposits from financial institutions (Schedule FF Individual, Part I) (See instructions) (1E)	00	00
	F) Other interests subject to 10% withholding (Schedule FF Individual, Part I, line 4, Column A) (1F)	00	00
	G) Other interests subject to withholding of ___% (Schedule FF Individual, Part I, line 4, Column F) (1G)	00	00
	H) Other interests not subject to withholding (Schedule FF Individual, Part I, line 4, Column G) (1H)	00	
	I) Eligible dividend distributions from corporations subject to 15% withholding (Schedule FF Individual, Part II, line 3, Column A) (1I)	00	00
	J) Dividend distributions subject to withholding of ___% (Schedule FF Individual, Part II, line 3, Columns B and C) (1J)	00	00
	K) Other dividends not subject to withholding (Schedule FF Individual, Part II, line 3, Column D) (1K)	00	
	L) Other income (Schedule F Individual, Part V, line 5 and Schedule FF Individual, Part III, line 4) (1L)	00	00
	M) Dividends from Capital Investment or Tourism Fund (See instructions) (1M)	00	00
	N) Net long-term capital gain (or loss) on Investment Funds (See instructions) (1N)	00	00
	O) Distributable share on profits (or losses) from pass-through entities (See instructions) (1O)	00	00
	(i) Gross income from pass-through entities (Schedule R Individual, Part I, line 6) (1O <i>i</i>)	00	
	(ii) Gross income related to services rendered of pass-through entities (Schedule R Individual, Part I, line 1) (1Oii)	00	
	(iii) Gross income of subsidiary pass-through entities (Schedule R Individual, Part I, line 7) (1Oiii)	00	
	(iv) Gross income from services rendered of subsidiary pass-through entities (Schedule R Individual, Part I, line 2) (1Oiv)	00	
	P) Gain (or loss) from manufacturing (Schedule J Individual, Part IV, line 9) (Total \$ _____) (Net income under special act: Act _____ Rate _____ %) (1P)	00	00
	Q) Gain (or loss) from the sale of goods (Schedule K Individual, Part IV, line 9) (Total \$ _____) (Net income under special act: Act _____ Rate _____ %) (1Q)	00	00
	R) Gain (or loss) from farming (Schedule L Individual, Part IV, line 9) (Total \$ _____) (Net income under special act: Act _____ Rate _____ %) (1R)	00	00
	S) Gain (or loss) from services rendered (Schedule M Individual, Part IV, line 9) (Total \$ _____) (Net income under special act: Act _____ Rate _____ %) (1S)	00	00
	T) Gain (or loss) from rental business (Schedule N Individual, Part IV, line 9) (Total \$ _____) (Net income under special act: Act _____ Rate _____ %) (1T)	00	00
U) Exempt income (Schedule IE Individual) (1U)	00		
V) Exempt income subject to alternate basic tax (Schedule IE Individual) (1V)	00		
W) Adjustment for purposes of the alternate basic tax (Submit detail) (1W)	00		
2. Deductions:			
A) Charitable contributions (Part VII) (2A)	00		
B) Medical expenses incurred and paid for the benefit of the grantor or beneficiary (Part VIII) (2B)	00		
C) Home mortgage interests on residential property located in Puerto Rico (Part IX) (2C)	00		
D) Casualty loss on real property that constitutes the grantor's principal residence (Part X) (2D)	00		
E) Loss of personal property as a result of certain casualties (Part XI) (2E)	00		
F) Allowable deduction for Private Equity investment (Part XIV) (2F)	00		

OATH

I hereby declare under penalty of perjury that this return (including all schedules and other documents attached) has been examined by me, and to the best of my knowledge and belief is a true, correct and complete return. The declaration of the person that prepares this return (except the taxpayer) is based on the information available, and this information has been verified.

Fiduciary's or Agent's Name (Print)	Fiduciary's or Agent's Signature	Date
Specialist's Name (Print)	Firm's or Business' Name	
Specialist's Signature	Date	Self-employed Specialist (fill in here) <input type="radio"/> Registration Number

Taxes Paid to Foreign Countries, the United States, its States, Territories and Possessions

Table with columns for Foreign Country, State, Territory or Possession of the United States (A, B, C), United States, and Total. Includes rows for Name of the country, state, territory or possession, Type of form, and Net income from sources.

Credits

Table for reporting tax credits. Includes instructions and a list of 17 credit categories (A and B) with corresponding amounts in the Pre Tax Credits Manager column.

Breakdown of the Purchase of Tax Credits

Table for reporting tax credits acquired through purchase. Includes instructions and a list of 15 credit categories (A and B) with corresponding amounts in the Pre Tax Credits Manager column.

Tax Credits Post Tax Credits Manager (See instructions)

The tax credits reported in this part must be duly registered in the Tax Credits Manager.		Post Tax Credit Manager
Part VI	1. Credit for stockholders who are individuals (Act 8 of 1987, as amended; or Act 135-1997, as amended) (1)	00
	2. Credit to hospital units for eligible payroll expenses (Act 168 of 1968, as amended) (2)	00
	3. Credit for investment in machinery and equipment for the generation and use of energy (Act 73-2008, as amended - Section 5(d)) (3)	00
	4. Credit for investment in machinery and equipment for the generation and use of energy (Act 73-2008, as amended - Section 5(d)(3)(B) applicable only to eligible businesses under Section 2(d)(1)(H)) (4)	00
	5. Credit for the purchase of products manufactured in Puerto Rico (Act 135-1997, as amended; Act 73-2008, as amended; Act 83-2010, as amended; or Act 60-2019, as amended) (5)	00
	6. Technology transfer investment credit (Act 73-2008, as amended - Section 5(f); Act 83-2010, as amended - Article 2.11(d); or Act 60-2019, as amended) (6)	00
	7. Credit for investment in research and development activities (Act 73-2008, as amended - Section 5(c); Act 83-2010, as amended - Article 2.11(c); or Act 60-2019, as amended - Section 3030.01) (7)	00
	8. Credit for industrial investment (Act 135-1997, as amended - Section 5A; or Act 73-2008, as amended - Section 6) (8)	00
	9. Credit for contributions to former governors' foundations (Act 1-2011, as amended - Section 1051.10) (9)	00
	10. Credit for construction investment in urban centers (Act 212-2002, as amended) (10)	00
	11. Credit for Puerto Rico conservation easement (Act 183-2001, as amended) (11)	00
	12. Credit for investment in rental housing to the elderly (Act 77-2015, as amended) (12)	00
	13. Credit for investment in film project (Act 27-2011, as amended; or Act 60-2019, as amended) (13)	00
	14. Credit for investment in housing infrastructure (Act 98-2001, as amended) (14)	00
	15. Credit for investment in infrastructure project for film projects (Act 27-2011, as amended) (15)	00
	16. Credit for investment in opportunity zones (Act 60-2019, as amended) (16)	00
	17. Credit for payments of membership certificates of employees-owned special corporations (Act 1-2011, as amended - Section 1113.14) (17)	00
	18. Credit for the purchase or transmission of television programming made in Puerto Rico (Act 1-2011, as amended - Section 1051.14) (18)	00
	19. Credit for tourism investment - Alternate credit (Act 74-2010, as amended; or Act 60-2019, as amended) (19)	00
	20. Credit for tourism investment - Regular credit (Act 74-2010, as amended) (20)	00
	21. Other Post Tax Credits Manager credits not included on the preceding lines (Submit detail) (21)	00

Charitable Contributions

Part VII	Name and address of institutions to which payment was made	Employer Identification Number	Nature of the organization	Amount
				00
				00
				00
				00
				00
				00
1. Total (Transfer to Part II, line 2A) (1)				00

Medical Expenses (includes the purchase of technological assistance equipment and the amount paid in the purchase of medicines through medical prescription)

Part VIII	Name and address of institutions to which payment was made	Employer Identification Number	Amount
			00
			00
			00
			00
			00
1. Total (Transfer to Part II, line 2B) (1)			00

Home Mortgage Interests on Qualified Residential Property Located in Puerto Rico

Part IX	Name and address of institutions to which payment was made	Employer Identification Number	Control No. Form 480.7A	Electronic Filing Confirmation No. Form 480.7A	Amount Paid
					00
					00
					00
					00
1. Total (Transfer to Part II, line 2C) (1)					00

Casualty Loss on Real Property that Constitutes the Grantor's Principal Residence

Part X	1. Total (Transfer to Part II, line 2D) (1)	00

Loss of Personal Property as a Result of Certain Casualties

Part XI			00
	1. Total (Transfer to Part II, line 2E) (1)		00

Contributions to the Trust by the Grantors

Part XII	Trustee's name	Trustee's address	Social Security Number	Share percentage in the Corpus of the Trust	Amount contributed to the Trust during the year
					00
					00
					00
					00

Distributions to Beneficiaries

Part XIII	Beneficiaries' Share			Column A	Column B
	Beneficiary's name and address	Social Security Number	Relationship	Amount paid or set apart	Share in the income tax withheld at source
				00	00
				00	00
				00	00
				00	00
				00	00
				00	00

Allowable Deduction for Private Equity Investment (Section 2042.03(d) of Act 60-2019, as amended, or Act 185-2014, as amended)

Part XIV			00
	1. Initial investment deduction amount (See instructions) (1)		00

Retention Period: Ten (10) years