



2025 Schedule M2RT, Resident Trust Questionnaire

Name of Trust _____

Federal ID Number _____

Minnesota ID Number _____

Check all boxes that apply to the trust, and provide additional requested information.

- 1 One or more of the trustees (or the trust's other fiduciaries) were residents (full-year or part-year) of Minnesota at any time during the tax year 1 ■ ☐
 1a. Enter all Minnesota and non-Minnesota names and addresses

- 2 One or more individuals or entities represented the trust or the trustee in Minnesota in connection with the activities that led to the income on which Minnesota taxes (see instructions) 2 ■ ☐
 2a. Enter all Minnesota and non-Minnesota names and addresses

- 3 One or more of the trust's tangible (real or personal) or intangible assets were located, in whole or in part, in Minnesota at any time during the tax year 3 ■ ☐
 3a. Describe the assets located in Minnesota and enter their fair market value on the applicable date(s)

- 4 Administration of the trust took place in Minnesota at any time during the tax year. 4 ■ ☐
 4a. Describe the trust administrative functions that took place in Minnesota

- 5 The laws of Minnesota were specifically made applicable to the trust 5 ■ ☐
 5a. The trust documents contain a choice of law provision designating Minnesota for that purpose. 5a ■ ☐
 5b. The trust was formed under, or its operation is governed by, the laws of Minnesota 5b ■ ☐

- 6 One or more of the trust's beneficiaries were residents (full-year or part-year) of Minnesota at any time during the tax year. 6 ■ ☐
 6a. Enter all Minnesota and non-Minnesota names and residential addresses

 6b. The resident beneficiaries have some degree of possession, control or enjoyment of the trust property or a right to receive that property 6b ■ ☐

- 7 One or more of the trust's settlors or grantors were residents (full-year or part-year) of Minnesota at any time during the tax year . 7 ■ ☐
 7a. Enter all Minnesota and non-Minnesota names and addresses

 7b. The resident settlors or grantors retained power to dispose of the trust property which amounted to a potential source of wealth to them 7b ■ ☐

- 8 Minnesota courts had continuing supervisory jurisdiction over the trust at any time during the tax year 8 ■ ☐

- 9 The trust was created by a will of a decedent who at death resided in Minnesota. 9 ■ ☐
 9a. The testamentary trust and the will under which it was created were probated in Minnesota. 9a ■ ☐

- 10 Lines 1 through 9 do not apply to the trust 10 ■ ☐

