1041 Department of the Treasury—Internal Revenue Service U.S. Income Tax Return for Estates and Trusts 2016

	► Int	torma	ition about Fo	orm 1041 and	l its separate i	instruct	tions is at wwv	v.irs.go	v/torm1041.							
Α	Check	all tha	it apply:	For calendar	r year 2016 or 1	fiscal ye	ar beginning			, 2016, and	l endi	ng		,	20	
	Deced	dent's e	estate	Name of estate or trust (If a grantor type trust, see the instructions.)							С	C Employer identification number				
_	Simple		, o dotate													
		lex trus		Name and title of fiduciary								D Date entity created				
=			ability trust													
=			tion only)	Number, stree	Number, street, and room or suite no. (If a P.O. box, see the instructions.)								E Nonexempt charitable and split-			
_		or type		, , , , , , , , , , , , , , , , , , , ,								interest trusts, check applicable box(es), see instructions.				
_			estate-Ch. 7									Described in sec. 4947(a)(1). Check here				
_			estate-Ch. 11	City or town, state or province, country, and ZIP or foreign postal code												
_				0.1, 0. 1011,	ty of town, state of province, country, and 211 of foreign postar code							if not a private foundation ▶ ☐ Described in sec. 4947(a)(2)				
_			me fund chedules K-1	F Check							-			, ,,	,	
	attach	ed (see	е	applicable	applicable							_	-	ing loss carryba		
		tions)		boxes:] Cna	inge in	fiduciary's addre	ess	
	_								Trust TIN				4			
Income	1		terest incom									.	1			
	2a		-			(0) Estate and a second							2a			
	k		Qualified dividends allocable to: (1) Beneficiaries (2) Estate or trust Business income or (loss). Attach Schedule C or C-EZ (Form 1040)													
	3												3			
	4						n 1041)					.	4			
	5	Re	Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 104										5			
	6	Fa	Farm income or (loss). Attach Schedule F (Form 1040)									. [6			
	7	Oı	Ordinary gain or (loss). Attach Form 4797										7			
	8	Ot	Other income. List type and amount									Ī	8			
	9					d 3 thro	ough 8					•	9			
Deductions	10				52 is attached		1						10			
	11		axes				_					İ	11			
	12		duciary fees								•	•	12			
	13		,									.	13			
			Charitable deduction (from Schedule A, line 7)													
	14		Attorney, accountant, and return preparer fees									.	14		_	
	15a			er deductions not subject to the 2% floor (attach schedule)									15a			
	k		Net operating loss deduction. See instructions									.	15b			
	(Allowable miscellaneous itemized deductions subject to the 2% floor									.	15c			
	16			d lines 10 through 15c												
	17	Ad	djusted total													
	18	In	Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 104													
	19	Es	Estate tax deduction including certain generation-skipping taxes (attach computation) .									.	19			
	20	Ex	Exemption										20			
	21	Ad	dd lines 18 th	lines 18 through 20								▶	21			
ients	22	Ta	Taxable income. Subtract line 21 from line 17. If a loss, see instructions										22			
	23	To	Total tax (from Schedule G, line 7)									. 1	23			
	24		Payments: a 2016 estimated tax payments and amount applied from 2015 return										24a			
	k		-	mated tax payments allocated to beneficiaries (from Form 1041-T)												
	,			24b from line 24a									24b 24c		_	
Ę	, ,					• •	•	24d		_						
Tax and Payments			Tax paid with Form 7004. See instructions									•	24e			
	'										 T-4-1		24h			
	05		her payments: 1				; g Form 41	36		·;	rotai		_		_	
	25		Total payments. Add lines 24c through 24e, and 24h									- 1	25		_	
			Estimated tax penalty. See instructions										26			
	27		Tax due. If line 25 is smaller than the total of lines 23 and 26, enter amount owed									- +	27			
	28		Overpayment. If line 25 is larger than the total of lines 23 and 26, enter amount overpaid Amount of line 28 to be: a Credited to 2017 estimated tax ► : b Refund										28			
	29									; b Refu	nded	•	29			
<u>.</u>							s return, including								wledge and	
	gn	Dellel	elief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of									. spait			o thic rot	
Here		N .											wi	lay the IRS discus- ith the preparer s	shown below	
		Sig	gnature of fiducia	ary or officer re	presenting fiduci	ary	Date		EIN of fiducia	ary if a financi	al insti	tution	(Se	ee instr.)?	s No	
Pa	nid .		Print/Type prep	oarer's name		Prepare	er's signature			Date		Che	eck 🗍	if PTIN		
		ror									self-employed					
	epa		Firm's name	▶ Fi						Firm	irm's EIN ▶					
US	se O	rilly	Firm's address								Dhor					

Form 1041 (2016) Page 2 Charitable Deduction. Don't complete for a simple trust or a pooled income fund. Schedule A Amounts paid or permanently set aside for charitable purposes from gross income. See instructions 1 2 2 Tax-exempt income allocable to charitable contributions. See instructions 3 3 4 4 Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes 5 5 6 Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes. See instructions . 6 Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13 7 7 Schedule B **Income Distribution Deduction** 1 2 2 3 Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions 3 4 Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion) 4 5 Capital gains for the tax year included on Schedule A, line 1. See instructions 5 6 Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss as a positive number . 6 7 **Distributable net income.** Combine lines 1 through 6. If zero or less, enter -0- 7 8 If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law . | 8 | 9 9 10 10 11 Total distributions. Add lines 9 and 10. If greater than line 8, see instructions 11 12 12 Tentative income distribution deduction. Subtract line 12 from line 11 13 13 14 Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0-14 15 Income distribution deduction. Enter the smaller of line 13 or line 14 here and on page 1, line 18 15 Tax Computation (see instructions) Tax: a Tax on taxable income. See instructions 1a **b** Tax on lump-sum distributions. Attach Form 4972 1b c Alternative minimum tax (from Schedule I (Form 1041), line 56) 1c d Total. Add lines 1a through 1c 1d Foreign tax credit. Attach Form 1116 General business credit. Attach Form 3800 2b Credit for prior year minimum tax. Attach Form 8801 2c 2e 3 3 Subtract line 2e from line 1d. If zero or less, enter -0- Net investment income tax from Form 8960, line 21 4 4 5 Recapture taxes. Check if from: Form 4255 Form 8611 5 6 Household employment taxes. Attach Schedule H (Form 1040) 6 7 Total tax. Add lines 3 through 6. Enter here and on page 1, line 23 Other Information Yes No Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses. 1 Enter the amount of tax-exempt interest income and exempt-interest dividends ▶ \$ 2 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any At any time during calendar year 2016, did the estate or trust have an interest in or a signature or other authority 3 over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country During the tax year, did the estate or trust receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," the estate or trust may have to file Form 3520. See instructions Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see 5 If this is an estate or a complex trust making the section 663(b) election, check here. See instructions . . . ▶ □ 6 To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here. See instructions . . . ▶ 🗌 7 8 If the decedent's estate has been open for more than 2 years, attach an explanation for the delay in closing the estate, and check here 9

Was the trust a specified domestic entity required to file Form 8938 for the tax year (see the Instructions for

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