

2018

2017

Form

1041

Department of the Treasury—Internal Revenue Service

U.S. Income Tax Return for Estates and Trusts

OMB No. 1545-0092

Go to www.irs.gov/Form1041 for instructions and the latest information.

Header section A-G: Check all that apply, For calendar year 2017 or fiscal year beginning, 2017, and ending, 20, Name of estate or trust, Employer identification number, Date entity created, Nonexempt charitable and split-interest trusts, Number of Schedules K-1 attached, Check applicable boxes, Check here if the estate or filing trust made a section 645 election.

Income section 1-9: 1 Interest income, 2a Total ordinary dividends, b Qualified dividends allocable to: (1) Beneficiaries (2) Estate or trust, 3 Business income or (loss), 4 Capital gain or (loss), 5 Rents, royalties, partnerships, other estates and trusts, etc., 6 Farm income or (loss), 7 Ordinary gain or (loss), 8 Other income, 9 Total income.

Deductions section 10-21: 10 Interest, 11 Taxes, 12 Fiduciary fees, 13 Charitable deduction, 14 Attorney, accountant, and return preparer fees, 15a Other deductions not subject to the 2% floor, b Net operating loss deduction, c Allowable miscellaneous itemized deductions subject to the 2% floor, 16 Add lines 10 through 15c, 17 Adjusted total income or (loss), 18 Income distribution deduction, 19 Estate tax deduction, 20 Exemption, 21 Add lines 18 through 20.

Tax and Payments section 22-30: 22 Taxable income, 23 Total tax, 25 Payments: a 2017 estimated tax payments and amount applied from 2016 return, b Estimated tax payments allocated to beneficiaries, c Subtract line 25b from line 25a, d Tax paid with Form 7004, e Federal income tax withheld, g Other payments, h Total payments, 26 Estimated tax penalty, 27 Tax due, 28 Overpayment, 29 Amount of line 29 to be: a Credited to 2018 estimated tax, b Refunded.

Sign Here section: Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Paid Preparer Use Only section: Print/Type preparer's name, Preparer's signature, Date, Check if self-employed, PTIN, Firm's name, Firm's EIN, Firm's address, Phone no.

Schedule A Charitable Deduction. Don't complete for a simple trust or a pooled income fund.

Table with 7 rows for Schedule A Charitable Deduction, including lines 1 through 7.

Schedule B Income Distribution Deduction

Table with 15 rows for Schedule B Income Distribution Deduction, including lines 1 through 15.

Schedule G Tax Computation (see instructions)

Table with 7 rows for Schedule G Tax Computation, including lines 1 through 7.

Other Information

Table with 10 rows for Other Information, including questions 1 through 10.