

**Schedule K-1
(Form 1041)**

Department of the Treasury
Internal Revenue Service

2018 →
For calendar year ~~2017~~, or tax year

beginning / / ~~2017~~ ending / /

Beneficiary's Share of Income, Deductions, Credits, etc.

▶ See back of form and instructions.

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Final K-1 Amended K-1

OMB No. 1545-0092

Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items

Part I Information About the Estate or Trust

A Estate's or trust's employer identification number

B Estate's or trust's name

C Fiduciary's name, address, city, state, and ZIP code

D Check if Form 1041-T was filed and enter the date it was filed _____

E Check if this is the final Form 1041 for the estate or trust

1	Interest income	11	Final year deductions
2a	Ordinary dividends		
2b	Qualified dividends		
3	Net short-term capital gain		
4a	Net long-term capital gain		
4b	28% rate gain	12	Alternative minimum tax adjustment
4c	Unrecaptured section 1250 gain		
5	Other portfolio and nonbusiness income		
6	Ordinary business income		
7	Net rental real estate income	13	Credits and credit recapture
8	Other rental income		
9	Directly apportioned deductions		
		14	Other information
10	Estate tax deduction		

Part II Information About the Beneficiary

F Beneficiary's identifying number

G Beneficiary's name, address, city, state, and ZIP code

For IRS Use Only

*See attached statement for additional information.
Note: A statement must be attached showing the beneficiary's share of income and directly apportioned deductions from each business, rental real estate, and other rental activity.

H Domestic beneficiary Foreign beneficiary

2018 →

This list identifies the codes used on Schedule K-1 for beneficiaries and provides summarized reporting information for beneficiaries who file Form 1040. For detailed reporting and filing information, see the Instructions for Schedule K-1 (Form 1041) for a Beneficiary Filing Form 1040 and the instructions for your income tax return.

	<i>Report on</i>		<i>Report on</i>
1. Interest income	Form 1040, line 8a	13. Credits and credit recapture	
2a. Ordinary dividends	Form 1040, line 9a	<i>Code</i>	
2b. Qualified dividends	Form 1040, line 9b	A Credit for estimated taxes	Form 1040, line 65
3. Net short-term capital gain	Schedule D, line 5	B Credit for backup withholding	Form 1040, line 64
4a. Net long-term capital gain	Schedule D, line 12	C Low-income housing credit	See the beneficiary's instructions
4b. 28% rate gain	28% Rate Gain Worksheet, line 4 (Schedule D Instructions)	D Rehabilitation credit and energy credit	
4c. Unrecaptured section 1250 gain	Unrecaptured Section 1250 Gain Worksheet, line 11 (Schedule D Instructions)	E Other qualifying investment credit	
5. Other portfolio and nonbusiness income	Schedule E, line 33, column (f)	F Work opportunity credit	
6. Ordinary business income	Schedule E, line 33, column (d) or (f)	G Credit for small employer health insurance premiums	
7. Net rental real estate income	Schedule E, line 33, column (d) or (f)	H Biofuel producer credit	
8. Other rental income	Schedule E, line 33, column (d) or (f)	I Credit for increasing research activities	
9. Directly apportioned deductions		J Renewable electricity, refined coal, and Indian coal production credit	
<i>Code</i>		K Empowerment zone employment credit	
A Depreciation	Form 8582 or Schedule E, line 33, column (c) or (e)	L Indian employment credit	
B Depletion	Form 8582 or Schedule E, line 33, column (c) or (e)	M Orphan drug credit	
C Amortization	Form 8582 or Schedule E, line 33, column (c) or (e)	N Credit for employer-provided child care and facilities	
10. Estate tax deduction	Schedule A, line 28	O Biodiesel and renewable diesel fuels credit	
11. Final year deductions		P Credit to holders of tax credit bonds	
A Excess deductions	Schedule A, line 23	Q Credit for employer differential wage payments	
B Short-term capital loss carryover	Schedule D, line 5	R Recapture of credits	
C Long-term capital loss carryover	Schedule D, line 12; line 5 of the wksht. for Sch. D, line 18; and line 16 of the wksht. for Sch. D, line 19	Z Other credits	
D Net operating loss carryover – regular tax	Form 1040, line 21	14. Other information	
E Net operating loss carryover – minimum tax	Form 6251, line 44	A Tax-exempt interest	Form 1040, line 8b
12. Alternative minimum tax (AMT) items		B Foreign taxes	Form 1040, line 48 or Sch. A, line 8
A Adjustment for minimum tax purposes	Form 6251, line 45	C Qualified production activities income	Form 8903, line 7, col. (b) (also see the beneficiary's instructions)
B AMT adjustment attributable to qualified dividends	See the beneficiary's instructions and the Instructions for Form 6251	D Form W-2 wages	Form 8903, line 17
C AMT adjustment attributable to net short-term capital gain		E Net investment income	Form 4952, line 4a
D AMT adjustment to net long-term capital gain		F Gross farm and fishing income	Schedule E, line 42
E AMT adjustment attributable to unrecaptured section 1250 gain		G Foreign trading gross receipts (IRC 942(a))	See the Instructions for Form 8873
F AMT adjustment attributable to 28% rate gain		H Adjustment for section 1411 net investment income or deductions	Form 8960, line 7 (also see the beneficiary's instructions)
G Accelerated depreciation		Z Other information	See the beneficiary's instructions
H Depletion			
I Amortization			
J Exclusion items			

See the beneficiary's instructions

2f

2j

Z

Qualified business income, section 199A See the beneficiary's instructions

Note: If you are a beneficiary who does not file a Form 1040, see instructions for the type of income tax return you are filing.