## 1041 Department of the Treasury – Internal Revenue Service U.S. Income Tax Return for Estates and Trusts Go to www.irs.gov/Form1041 for instructions and the latest information.

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A	Check	all tha	at apply:	For calendar year 2017 or fiscal year beginning , 2017, and						ending			, 2	20	
Decedent's estate			estate	Name of estate or trust (If a grantor type trust, see the instructions.)								yer i	dentification nur	mber	
=		e trust		,											
=	•			Name and title of fiduciary							D Date entity created				
=		lex tru		Trains and this or industry						Date entity created					
$\Box$	Qualif	ied dis	ability trust												
	ESBT	(S por	tion only)	Number, street, and room or suite no. (If a P.O. box, see the instructions.)							E Nonexempt charitable and split- interest trusts, check applicable				
	Granto	or type	ype trust								box(es), see instructions.				
	Bankr	uptcy	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							if not a private foundation				
_			me fund										in sec. 4947(a)(2)		
=			schedules K-1	F Check	I loitial nature		Final return	Amended retu		ᆛ片					
a	attached (see			applicable	Initial return		_			ㅂ			ing loss carrybac		
		ctions)		boxes:	Change in trust		Change in fiduciary		ıcıary's name	∐	Chan	ge ın	fiduciary's addres	SS	
G	_				section 645 ele	ction.	<u> ▶</u>	Trust TIN ▶							
	1	In	terest incom	e							. L	1			
	2	a To	Total ordinary dividends								. [:	2a			
	l	<b>b</b> Q	ualified divide	nds allocable t	to: (1) Benefi	ciaries		(2) Estate or trus	it						
Income	3		Qualified dividends allocable to: (1) Beneficiaries (2) Estate or trust  Business income or (loss). Attach Schedule C or C-EZ (Form 1040)									3			
	4			, ,			•	,				4			
8	5		Capital gain or (loss). Attach Schedule D (Form 1041)									5		$\overline{}$	
<u>=</u>	9		Rents, royalties, partnerships, other estates and trusts, etc. Attach Schedule E (Form 104									6		+	
	6		Farm income or (loss). Attach Schedule F (Form 1040)									-		_	
	7		Ordinary gain or (loss). Attach Form 4797									7			
	8			List type and							🛏	8			
	9	T	Total income. Combine lines 1, 2a, and 3 through 8								<b>•</b>	9			
Deductions	10	In	Interest. Check if Form 4952 is attached ▶ □ · · · · · · · · · · · · · · · · · ·									10			
	11	Ta	axes									11			
	12	Fi	Fiduciary fees. If a portion is subject to the 2% floor, see instructions									12			
	13		Charitable deduction (from Schedule A, line 7)								-	13		+	
	14		Attorney, accountant, and return preparer fees. If a portion is subject to the 2% floor, see inst								-	14		+	
											· -	-		_	
	15		Other deductions <b>not</b> subject to the 2% floor (attach schedule)									5a		-	
			Net operating loss deduction. See instructions									5b			
	(	c A	llowable miscellaneous itemized deductions subject to the 2% floor								. 1	5c			
	16	A	Add lines 10 through 15c								<b>▶</b> _	16			
	17	A	Adjusted total income or (loss). Subtract line 16 from line 9												
	18	In	Income distribution deduction (from Schedule B, line 15). Attach Schedules K-1 (Form 104									18			
	19		Estate tax deduction including certain generation-skipping taxes (attach computation) .								. [	19			
	20		Exemption									20			
	21		Add lines 18 through 20									21		+	
-	22									•	_	22		+	
nts			Taxable income. Subtract line 21 from line 17. If a loss, see instructions								-	-		_	
	23		Total tax (from Schedule G, line 7)									23		_	
	24		Payments: a 2017 estimated tax payments and amount applied from 2016 return									24a			
			stimated tax payments allocated to beneficiaries (from Form 1041-T)								-	24b			
пe	•			tract line 24b from line 24a								24c			
⋛		d Ta	ax paid with I	with Form 7004. See instructions											
Tax and Payments	(	e Fe	ederal incom	e tax withheld	k ▶ 🗌 🕠			. 2	24e						
					-						▶ 2	24h			
	25	T	Other payments: f Form 2439 ; g Form 4136 ; T  Total payments. Add lines 24c through 24e, and 24h									25			
	26											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 mount of line 28 to be: a Credited to 2018 estimated tax ► : b Refund									28		-	
	29								; b Refur			29			
e:	Under penalties of pe													rieage and	
Si	-	20110	.,	, aa complete.		p. 5pui 6i	. (Sinoi man tanpaye	., 22004 011 411 111		pi	ال المام		lay the IRS discuss	thic roturn	
He	ere	<b>k</b>						<b>&gt;</b>				w	ith the preparer sho	own below	
		Si	gnature of fiducia	ary or officer repr	esenting fiduci	ary	Date	EIN of fiduo	iary if a financia	al instit	ution	(s	ee instr.)? Yes	No	
D-	امن		Print/Type prep	parer's name		Prepare	er's signature		Date		Chec	ν <u> </u>	<sub>if</sub> PTIN		
Pa											self-e				
	epa		Eirm's nema									•			
Us	e O	nly	Firm's name							Firm's EIN ▶					
			Firm's address	· <b>*</b>						Phon	e no.				

Form 1041 (2017) Page 2 Schedule A Charitable Deduction. Don't complete for a simple trust or a pooled income fund. 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 2017, 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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