

Schedule K-1 (Form 1041)

Department of the Treasury Internal Revenue Service

2017

For calendar year 2017, or tax year

Final K-1

Amended K-1

OMB No. 1545-0092

beginning 2017 ending

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

See back of form and instructions.

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

Part II Information About the Beneficiary
F Beneficiary's identifying number
G Beneficiary's name, address, city, state, and ZIP code
H Domestic beneficiary Foreign beneficiary

Table with 2 columns: Item description (1-10) and Amount. Items include Interest income, Dividends, Capital gains, Business income, Rental income, and Deductions.

*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.

For IRS Use Only

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>		
1. Interest income		Form 1040, line 8a	13. Credits and credit recapture	
2a. Ordinary dividends		Form 1040, line 9a	<i>Code</i>	<i>Report on</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 11	A Tax-exempt interest	
12. Alternative minimum tax (AMT) items			B Foreign taxes	
A Adjustment for minimum tax purposes		Form 6251, line 15	C Qualified production activities income	
B AMT adjustment attributable to qualified dividends	} See the beneficiary's instructions and the Instructions for Form 6251		D Form W-2 wages	
C AMT adjustment attributable to net short-term capital gain			E Net investment income	
D AMT adjustment attributable to net long-term capital gain			F Gross farm and fishing income	
E AMT adjustment attributable to unrecaptured section 1250 gain			G Foreign trading gross receipts (IRC 942(a))	
F AMT adjustment attributable to 28% rate gain			H Adjustment for section 1411 net investment income or deductions	
G Accelerated depreciation			I Other information	
H Depletion				
I Amortization				
J Exclusion items				
				Form 1040, line 8b
				Form 1040, line 48 or Sch. A, line 8
				Form 8903, line 7, col. (b) (also see the beneficiary's instructions)
				Form 8903, line 17
			Form 4952, line 4a	
			Schedule E, line 42	
			See the Instructions for Form 8873	
			Form 8960, line 7 (also see the beneficiary's instructions)	
			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.