

# Form SC1041 Return Summary

For calendar year 2018, or tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

58-9999999

THE ESTATE OF WALT DISNEY

**Income**

Federal taxable income		8,340
Federal exemption		
Modifications related to gains allocated to principal		-492

Additions:

State and local interest		
State / local taxes on fed. return	574	
Federal net operating loss		
Out-of state losses	8,842	
Other additions		
<b>Total additions</b>		9,416

Subtractions

Interest on U.S. obligations	3,944	
State / local refunds on fed. return		
SC net operating loss		
Active trade / business inc. ded.		
Other subtractions		
<b>Total subtractions</b>		3,944

Total adjustment		5,472
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Fiduciary adjustment from pass-through entities		
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Beneficiary portion of fiduciary adjustment		5,472
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**Fiduciary share of fiduciary adjustment**

South Carolina exemption		20
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**Taxable income**

7,828

**Tax Computation**

Tax on taxable income	164	
Tax on electing small business trust inc		
Other taxes		
Nonrefundable credits		
Nonresident beneficiary withholding		
<b>Total tax</b>		164

Extension payment and other credits	274	
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Estimated tax payments	300	
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Estimated tax penalty		
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Applied to next year's estimated tax		
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<b>Total payments / application</b>		574
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<b>Net tax</b>		0
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**Additions to Tax**

Interest on late payments		
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Penalties		
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<b>Total additions</b>		
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**Balance due**

<b>Refund</b>		410
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**Next Year's Estimates**

1st quarter		
2nd quarter		
3rd quarter		
4th quarter		
<b>Total</b>		

**Miscellaneous Information**

Amended return		-
Estimated payments allocated to beneficiaries		
Number of beneficiaries		1
Number of Schedule(s) K-1		1
Return / extended due date		04/15/19
Form 41, Balance due		



STATE OF SOUTH CAROLINA DEPARTMENT OF REVENUE FIDUCIARY INCOME TAX RETURN

SC1041 (Rev. 10/11/17) 3084

For the calendar year 2017 or Fiscal Taxable Year Beginning and ending 2017

Name of Estate or Trust THE ESTATE OF WALT DISNEY FEIN 58-9999999

Name and Title of Fiduciary FID NAME Mailing Address City State ZIP Code County Code FID MANAGER 1 MICKEY WAY ANAHIEM CA 19379 Out of SC

ATTACH COPY OF FEDERAL FORM 1041 AND ALL ITS SCHEDULES, INCLUDING SCHEDULES K-1. Extension Requested: Yes

A. Check If: Address change, Amended return, Final return, Electing Small Business Trust, Simple trust, Complex trust, Estate, Grantor Trust, B. If trust, check whether: Testamentary, Inter vivos, C. Also check if: Resident estate or trust, Nonresident estate or trust, D. Has final distribution of assets been made during the year? Yes, No

E. During this taxable year, was this estate or trust notified of any federal change for any prior years? YES or NO If YES, attach copy. F. Is a federal Schedule K-1 attached for each beneficiary? YES or NO If YES, how many? 1 If NO, attach explanation.

If a NONRESIDENT estate or trust with income from both South Carolina and Non-South Carolina sources - complete and attach Part III, page 3 of SC1041.

Table with 3 columns: Line number, Description, Amount. Rows include: 1. FEDERAL TAXABLE INCOME (8,340.00), 2. Federal fiduciary exemption (00), 3. South Carolina Modifications (SEE STATEMENT 1, -492.00), 4. Fiduciary's Share of SC Fiduciary Adjustment (00), 5. NET (7,848.00), 6. South Carolina fiduciary exemption (20.00), 7. SOUTH CAROLINA TAXABLE INCOME (7,828.00), 8. SOUTH CAROLINA TAX (164.00), 9. TAX on Lump Sum Distribution (00), 10. Less NON-REFUNDABLE CREDITS (00), 11. Combine lines 8 - 10 (164.00), 12. South Carolina income tax withheld (00), 13. TOTAL TAX (164.00), 14. Amount paid with: (a) ext. (00), (b) SC Withholding (274.00), SEE STMT 2, Enter total (274.00), 15. Est. Tax Payments: (a) (300.00), Amt. applied from 2016 return: (b) (00), Enter total (300.00), 16. Total Payments (574.00), 17. Overpayment (410.00), 18. Late Filing and/or late payment: Penalties (00), Interest (00), Enter total here (00), 19. Penalty for Underpayment of Estimated Tax (00), 20. Balance Due (BALANCE DUE) (00), 21. Amount of line 17 to be credited to 2018 Estimated Tax (00), 22. Net Refund (REFUND) (410.00)

Please Sign Here: I declare that this return and all attachments are true, correct and complete to the best of my knowledge and belief. Signature of fiduciary or officer representing fiduciary Date Taxpayer's Email I authorize the Director of the Department of Revenue or delegate to discuss this return, attachments and related tax matters with the preparer. Yes No Preparer's Printed Name Paid: Preparer's signature JEREMIAH GILLETT Date 11/08/18 Check if self-employed X Preparer's telephone number 800-968-8900 Preparer's Use Only: Firm's name AFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIA PTIN or FEIN P12345678 and address ACITYCITYCITYCITYCIA, MI ZIP Code 48130-1234

**Part I - SOUTH CAROLINA FIDUCIARY ADJUSTMENT**

		Adjustments to amount included in federal distributable net income	
1. Additions to federal taxable income:			
a. State and local interest	1a		
b. State or local taxes measured by income deducted on the federal return	1b	574	
c. Federal net operating loss carryover	1c		
d. Out-of state losses	1d	8,842	
e. Other additions to income (see instr.) - ATT. AN EXPLANATION	1e		
f. Total additions to federal income (add lines 1a through 1e)			1f 9,416
2. Subtractions from federal taxable income			
a. Interest on US Government obligations	2a	3,944	
b. State income tax refunds reported as income on federal return	2b		
c. South Carolina net operating loss carryover (attach schedule)	2c		
d. Active Trade or Business Income Deduction (I-335, line 5)	2d		
e. Other subtractions from inc. (see instr.) - ATT. AN EXPLANATION	2e		
f. Total subtractions from federal taxable income (add lines 2a through 2e)			2f 3,944
3. Total (subtract line 2f from line 1f)			3 5,472
4. Fiduciary adjustment from other estates or trusts and partnership adjustment (attach schedule)			4
5. South Carolina fiduciary adjustment (add lines 3 and 4) Addition <input checked="" type="checkbox"/> or Subtraction			5 5,472

**Part II - ALLOCATION OF SOUTH CAROLINA FIDUCIARY ADJUSTMENT**

Complete ONLY if Part I indicates a South Carolina Fiduciary Adjustment. It is allocated among all beneficiaries and fiduciary in the same ratio as their relative shares of Federal Distributable Net Income. Nonresident beneficiaries see parts III and IV for computation of income.

1. Name of each beneficiary. Check box if beneficiary is a nonresident. All beneficiaries receiving federal K-1 must be listed. Use attachment if more than eight beneficiaries.	Social Security Number	Shares of Federal Distributable Net Income		4. Shares of South Carolina Fiduciary Adjustment Addition or Subtraction <input checked="" type="checkbox"/>
		2. Amount	3. Percent	
a. MELANIE JUNE	<input checked="" type="checkbox"/> 123-12-2222	109,283	100.0000 %	5,472
b.			%	
c.			%	
d.			%	
e.			%	
f.			%	
g.			%	
h.			%	
i. Fiduciary			%	0
Totals		109,283	100%	5,472

**COLUMN 2** - Total federal distributable net income must be the same as line 7, Schedule B Form 1041.

**COLUMN 3** - Indicate percentages with two numbers, such as 32%, 3.2% and .32%.

**COLUMN 4** - Enter South Carolina Fiduciary Adjustment from line 5, Part I as the total of Column 4. Multiply each percentage in Column 3 times the total in Column 4. Indicate at the top of Column 4, whether the adjustments are additions or subtractions. If the adjustment is a subtraction, it may not offset more than the amount reportable from the fiduciary for federal tax purposes (except in the final or termination year).

**COLUMNS 2, 3, AND 4** - Attach a detailed explanation of the allocation method used if there is no federal distributable net income, or, if the percentages do not agree with the relative shares indicated on Form 1041, Schedules B and K-1.

**COLUMN 4** - The amount after each name is reported as a modification, either an addition to or subtraction from federal taxable income. Each resident beneficiary should add the explanation: "fiduciary adjustment - (name of estate or trust)". A copy of this schedule (or its information) must be provided to each resident beneficiary. The fiduciary's share of the adjustment is entered on line 4 of page 1.



THE ESTATE OF WALT DISNEY 58-9999999  
**FOR NONRESIDENT ESTATES AND TRUSTS OR RESIDENT ESTATES AND TRUSTS  
 WITH NONRESIDENT BENEFICIARIES**

**Part III - COMPUTATION OF FEDERAL TAXABLE INCOME OF THE ESTATE OR TRUST FROM  
 SOUTH CAROLINA SOURCES**

A. These items correspond to page 1. Federal Form 1041	B. Total income as reported on Federal Form 1041	C. That part of Column B from South Carolina sources	D. Nonresident fiduciary's portion of Column C and capital gains not distributed
<b>INCOME</b>			
1. Interest income	9,182	2	
2. Dividends	53,369		
3. Business income or (loss)			
4. Capital gain or (loss)	73,928	8,340	8,340
5. Rents, royalties, partnerships, other estates and trusts, etc.	-8,842		
6. Farm income or (loss)			
7. Ordinary gain or (loss)			
8. Other income			
9. Total income (combine lines 1 through 8)	127,637	8,342	8,340
<b>DEDUCTIONS</b>			
10. Interest			
11. Taxes	8,293	0	
12. Fiduciary fees			
13. Charitable deduction			
14. Attorney, accountant, and return preparer fees	10,000	654	
15a. Other deductions NOT subject to the 2% floor	61	0	
15b. Allowable miscellaneous itemized deductions subject to the 2% floor		184	
16. Total (add lines 10 through 15b)	18,354	838	
17. Subtract line 16 from line 9	109,283	7,504	8,340
18. Distributions to beneficiaries	32,843		
19. Federal estate tax (fiduciary)			
Federal estate tax (beneficiary)			
20. Exemption	300		
21. Total (add lines 18 through 20)	33,143		
22. Taxable income (subtract line 21 from line 17)	76,140	7,504	8,340
23. Total percent of all nonresident beneficiaries (from Part II, page 2)		100.0000 %	
24. Total South Carolina income of nonresident beneficiaries (multiply line 22 by line 23)		7,504	

**Part IV - NONRESIDENT BENEFICIARIES' SHARES OF INCOME AND CREDITS**

A. Name	B. Beneficiary's percentage from Part II	C. South Carolina capital gain (line 4, column C, Part III multiplied by column B)	D. South Carolina ordinary income (line 22, column C, Part III less capital gains times Column B.)	E. Less amounts exempt from withholding by I-41 Affidavit.	F. Tax to be withheld (net amount of column C, column D and column E times 7%)
a. Melanie June <span style="float: right;">123-12-2222</span>	100.0000	7,221	2	7,223	
b.					
c.					
d.					
e.					
<b>TOTALS</b>	100.0000 %	7,221	2	7,223	

**Part V - NONRESIDENT EXEMPTION ALLOWANCE FOR FIDUCIARY**

1. Exemption allowance claimed on Federal Form 1041	1	300
2. Ratio of total South Carolina income (line 9, column D, Part III) to total federal income (line 9, column B, Part III)	2	6.5342 %
3. South Carolina nonresident fiduciary exemption (multiply line 1 by line 2 and enter on line 6 page 1)	3	20

1022

BENEFICIARY 1  
SEE STATEMENT 1

STATE OF SOUTH CAROLINA

DEPARTMENT OF REVENUE

**BENEFICIARY'S SHARE OF SOUTH CAROLINA  
INCOME, DEDUCTIONS, CREDITS, ETC.**

**SC1041 K-1**

(Rev. 6/4/15)

3516

For calendar year 2018 or tax year beginning and ending

Beneficiary's identifying number } 123-12-2222 Estate or trust's FEIN } 58-9999999

Beneficiary's name, address and ZIP code

MELANIE JUNE  
3418 RAFFERTY DR  
NEW YORK NY 10002

Estate or trust's name, fiduciary's name, address and ZIP code

THE ESTATE OF WALT DISNEY  
FID NAME  
1 MICKEY WAY  
ANAHIEM CA 19379

Check if applicable: (1)  Final K-1 (2)  Amended K-1 (3)  Nonresident

Beneficiary's Share of Current Year Income, Deductions, Credits, etc.	(A) Federal K-1 Amounts		(B) Plus or Minus SC Adjustments		(C) Amounts Not Allocated or Apportioned to SC		(D) Amounts Allocated or Apportioned to SC		
1 Interest income	1	3,944	1	-3,616	1	326	1	2	
2 Dividends	2	41,649	2	3,339	2	44,988	2		
3 Net short-term capital gain	3		3		3		3		
4 Net long-term capital gain	4	63,690	4	-56,469	4		4	7,221	
5 Other portfolio and nonbusiness income	5		5		5		5		
6 Ordinary business income	6		6		6		6		
7 Net rental real estate income	7		7		7		7		
8 Other rental income	8		8		8		8		
9 Directly apportioned deductions	9		9		9		9		
10 Estate tax deduction	10		10		10		10		
11 Final year deductions	11		11		11		11		
12 Withholding tax for nonresident beneficiary (See SC1041 K-1 Instructions)							12		
List applicable South Carolina tax credits. (Attach an additional sheet if needed.)									
13							13		
14							14		
15							15		
16							16		
17 Total South Carolina tax credits							17		

35161017

## SC1041 K-1

**General purpose** - SC1041 K-1 is prepared by the estate or trust to show each beneficiary's share of the entity's income. Each item of income is adjusted as required by South Carolina law and allocated or apportioned to South Carolina or to states other than South Carolina.

### INSTRUCTIONS

**Column A, lines 1 through 11** - Enter amounts from the federal Schedule K-1.

**Column B, lines 1 through 11** - Enter the beneficiary's share of plus or minus South Carolina adjustments to federal taxable income (loss). See SC1041 instructions.

**Column C, lines 1 through 11** - Enter the beneficiary's share of income (loss) or deductions allocated or apportioned to states other than South Carolina. See SC1041 instructions.

**Column D, lines 1 through 11** - Enter the beneficiary's share of income (loss) or deductions allocated or apportioned to South Carolina.

**Line 12** - Estates or trusts are required to withhold 7% of the South Carolina taxable income of nonresident beneficiaries. Estates or trusts must provide nonresident beneficiaries a **Federal Form 1099 MISC with "South Carolina Only"** written at the top showing respective amounts of income and tax withheld. Enter the tax withholding amount on line 12.

**Line 13 through 16** - List the beneficiary's share of applicable South Carolina credits.

**Instructions for Estate or Trust** - Include SC1041 K-1 with your SC1041 Fiduciary Income Tax Return. Provide a copy to the beneficiary.

**Instructions for Beneficiary** - If filing a paper return, attach to your Income Tax Return. If filing electronically, keep with your records.

### Social Security Privacy Act Disclosure

It is mandatory that you provide your social security number on this tax form. 42 U.S.C 405(c)(2)(C)(i) permits a state to use an individual's social security number as means of identification in administration of any tax. SC Regulation 117-201 mandates that any person required to make a return to the SC Department of Revenue shall provide identifying numbers, as prescribed, for securing proper identification. Your social security number is used for identification purposes.

### The Family Privacy Protection Act

Under the Family Privacy Protection Act, the collection of personal information from citizens by the Department of Revenue is limited to the information necessary for the Department to fulfill its statutory duties. In most instances, once this information is collected by the Department, it is protected by law from public disclosure. In those situations where public disclosure is not prohibited, the Family Privacy Protection Act prevents such information from being used by third parties for commercial solicitation purposes.

**South Carolina Statements****Statement 1 - Form SC1041, Page 1, Line 3 - Modifications Relating to Gains Allocated to Principal**

<u>Description</u>	<u>Amount</u>
Capital gain deduction (1119 x 44%)	\$ <u>-492</u>
	<u>-492</u>

**Statement 2 - Form SC1041, Page 1, Line 14 - Extension Payment and Other Credits**

<u>Description</u>	<u>Amount</u>
South Carolina Income Tax Withheld	\$ <u>274</u>
Total	\$ <u>274</u>

# South Carolina Statements

Melanie June

123-12-2222

## Statement 1 - South Carolina Schedule K-1 - Additional Information

<u>Description</u>	<u>Amount</u>
Income taxes deduction on federal Form 1041	\$ 574
Out of state losses	8,842





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

1	Amounts paid or permanently set aside for charitable purposes from gross income. See instructions	1	
2	Tax-exempt income allocable to charitable contributions. See instructions	2	
3	Subtract line 2 from line 1	3	
4	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes	4	
5	Add lines 3 and 4	5	
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purposes. See instructions	6	
7	<b>Charitable deduction.</b> Subtract line 6 from line 5. Enter here and on page 1, line 13	7	

**Schedule B Income Distribution Deduction**

1	Adjusted total income. See instructions	1	109,283
2	Adjusted tax-exempt interest	2	
3	Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions	3	73,928
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	0
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	-73,928
7	<b>Distributable net income.</b> Combine lines 1 through 6. If zero or less, enter -0-	7	109,283
8	If a complex trust, enter accounting income for the tax year as determined under the governing instrument and applicable local law	8	
9	Income required to be distributed currently	9	32,843
10	Other amounts paid, credited, or otherwise required to be distributed	10	0
11	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions	11	32,843
12	Enter the amount of tax-exempt income included on line 11	12	
13	Tentative income distribution deduction. Subtract line 12 from line 11	13	32,843
14	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter -0-	14	109,283
15	<b>Income distribution deduction.</b> Enter the smaller of line 13 or line 14 here and on page 1, line 18	15	32,843

**Schedule G Tax Computation** (see instructions)

1	<b>Tax:</b>			
	<b>a</b> Tax on taxable income. See instructions	1a	26,558	
	<b>b</b> Tax on lump-sum distributions. Attach Form 4972	1b		
	<b>c</b> Alternative minimum tax (from Schedule I (Form 1041), line 56)	1c	0	
	<b>d Total.</b> Add lines 1a through 1c	1d	26,558	
2a	Foreign tax credit. Attach Form 1116	2a		
	<b>b</b> General business credit. Attach Form 3800	2b		
	<b>c</b> Credit for prior year minimum tax. Attach Form 8801	2c		
	<b>d</b> Bond credits. Attach Form 8912	2d		
	<b>e Total credits.</b> Add lines 2a through 2d	2e	0	
3	Subtract line 2e from line 1d. If zero or less, enter -0-	3	26,558	
4	Net investment income tax from Form 8960, line 21	4		
5	Recapture taxes. Check if from: <input type="checkbox"/> Form 4255 <input type="checkbox"/> Form 8611	5		
6	Household employment taxes. Attach Schedule H (Form 1040)	6		
7	<b>Total tax.</b> Add lines 3 through 6. Enter here and on page 1, line 23	7	26,558	

**Other Information**

	Yes	No
1 Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of expenses. Enter the amount of tax-exempt interest income and exempt-interest dividends <b>u</b> \$		X
2 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement?		X
3 At any time during calendar year 2018, did the estate or trust have an interest in or a signature or other authority 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 <b>u</b>		X
4 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		X
5 Did the estate or trust receive, or pay, any qualified residence interest on seller-provided financing? If "Yes," see the instructions for required attachment		X
6 If this is an estate or a complex trust making the section 663(b) election, check here. See instructions	<input type="checkbox"/>	
7 To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here. See instructions	<input type="checkbox"/>	
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	<input type="checkbox"/>	
9 Are any present or future trust beneficiaries skip persons? See instructions		X
10 Was the trust a specified domestic entity required to file Form 8938 for the tax year (see the Instructions for Form 8938)?		X

**SCHEDULE I  
(Form 1041)**

**Alternative Minimum Tax—Estates and Trusts**

OMB No. 1545-0092

Department of the Treasury  
Internal Revenue Service

**u** Attach to Form 1041.  
**u** Go to [www.irs.gov/Form1041](http://www.irs.gov/Form1041) for instructions and the latest information.

**2018**

Name of estate or trust

Employer identification number

The Estate of Walt Disney

58-9999999

**Part I Estate's or Trust's Share of Alternative Minimum Taxable Income**

1	Adjusted total income or (loss) (from Form 1041, line 17)	1	109,283
2	Interest	2	
3	Taxes	3	8,293
4	Reserved for future use	4	
5	Refund of taxes	5	( )
6	Depletion (difference between regular tax and AMT)	6	
7	Net operating loss deduction. Enter as a positive amount	7	
8	Interest from specified private activity bonds exempt from the regular tax	8	
9	Qualified small business stock (see instructions)	9	
10	Exercise of incentive stock options (excess of AMT income over regular tax income)	10	
11	Other estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	11	
12	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	12	
13	Disposition of property (difference between AMT and regular tax gain or loss)	13	
14	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	14	
15	Passive activities (difference between AMT and regular tax income or loss)	15	
16	Loss limitations (difference between AMT and regular tax income or loss)	16	
17	Circulation costs (difference between regular tax and AMT)	17	
18	Long-term contracts (difference between AMT and regular tax income)	18	
19	Mining costs (difference between regular tax and AMT)	19	
20	Research and experimental costs (difference between regular tax and AMT)	20	
21	Income from certain installment sales before January 1, 1987	21	( )
22	Intangible drilling costs preference	22	
23	Other adjustments, including income-based related adjustments	23	
24	Alternative tax net operating loss deduction (See the instructions for the limitation that applies.)	24	( )
25	Adjusted alternative minimum taxable income. Combine lines 1 through 24	25	117,576
<b>Note:</b> Complete Part II below before going to line 26.			
26	Income distribution deduction from Part II, line 44	26	32,843
27	Estate tax deduction (from Form 1041, line 19)	27	
28	Add lines 26 and 27	28	32,843
29	Estate's or trust's share of alternative minimum taxable income. Subtract line 28 from line 25	29	84,733

If line 29 is:

- \$24,600 or less, stop here and enter -0- on Form 1041, Schedule G, line 1c. The estate or trust isn't liable for the alternative minimum tax.
- Over \$24,600, but less than \$180,300, go to line 45.
- \$180,300 or more, enter the amount from line 29 on line 51 and go to line 52.

**Part II Income Distribution Deduction on a Minimum Tax Basis**

30	Adjusted alternative minimum taxable income (see instructions)	30	117,576
31	Adjusted tax-exempt interest (other than amounts included on line 8)	31	
32	Total net gain from Schedule D (Form 1041), line 19, column (1). If a loss, enter -0-	32	73,928
33	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes (from Form 1041, Schedule A, line 4)	33	
34	Capital gains paid or permanently set aside for charitable purposes from gross income (see instructions)	34	
35	Capital gains computed on a minimum tax basis included on line 25	35	( 73,928)
36	Capital losses computed on a minimum tax basis included on line 25. Enter as a positive amount	36	
37	Distributable net alternative minimum taxable income (DNAMTI). Combine lines 30 through 36. If zero or less, enter -0-	37	117,576
38	Income required to be distributed currently (from Form 1041, Schedule B, line 9)	38	32,843
39	Other amounts paid, credited, or otherwise required to be distributed (from Form 1041, Schedule B, line 10)	39	
40	Total distributions. Add lines 38 and 39	40	32,843
41	Tax-exempt income included on line 40 (other than amounts included on line 8)	41	
42	Tentative income distribution deduction on a minimum tax basis. Subtract line 41 from line 40	42	32,843

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule I (Form 1041) (2018)

**Part II Income Distribution Deduction on a Minimum Tax Basis (continued)**

<b>43</b>	Tentative income distribution deduction on a minimum tax basis. Subtract line 31 from line 37. If zero or less, enter -0-	<b>43</b>	117,576
<b>44</b>	<b>Income distribution deduction on a minimum tax basis.</b> Enter the smaller of line 42 or line 43. Enter here and on line 26	<b>44</b>	32,843

**Part III Alternative Minimum Tax**

<b>45</b>	Exemption amount	<b>45</b>	24,600
<b>46</b>	Enter the amount from line 29	<b>46</b>	84,733
<b>47</b>	Phase-out of exemption amount	<b>47</b>	81,900
<b>48</b>	Subtract line 47 from line 46. If zero or less, enter -0-	<b>48</b>	2,833
<b>49</b>	Multiply line 48 by 25% (0.25)	<b>49</b>	708
<b>50</b>	Subtract line 49 from line 45. If zero or less, enter -0-	<b>50</b>	23,892
<b>51</b>	Subtract line 50 from line 46	<b>51</b>	60,841
<b>52</b>	Go to Part IV of Schedule I to figure line 52 if the estate or trust has qualified dividends or has a gain on lines 18a and 19 of column (2) of Schedule D (Form 1041) (as refigured for the AMT, if necessary). Otherwise, if line 51 is— • \$191,100 or less, multiply line 51 by 26% (0.26). • Over \$191,100, multiply line 51 by 28% (0.28) and subtract \$3,822 from the result	<b>52</b>	15,819
<b>53</b>	Alternative minimum foreign tax credit (see instructions)	<b>53</b>	
<b>54</b>	Tentative minimum tax. Subtract line 53 from line 52	<b>54</b>	15,819
<b>55</b>	Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Schedule G, line 2a)	<b>55</b>	26,558
<b>56</b>	<b>Alternative minimum tax.</b> Subtract line 55 from line 54. If zero or less, enter -0-. Enter here and on Form 1041, Schedule G, line 1c	<b>56</b>	0

**Part IV Line 52 Computation Using Maximum Capital Gains Rates**

**Caution:** If you didn't complete Part V of Schedule D (Form 1041), the Schedule D Tax Worksheet, or the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, see the instructions before completing this part.

<b>57</b>	Enter the amount from line 51	<b>57</b>	
<b>58</b>	Enter the amount from Schedule D (Form 1041), line 26, line 13 of the Schedule D Tax Worksheet, or line 4 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as refigured for the AMT, if necessary)	<b>58</b>	
<b>59</b>	Enter the amount from Schedule D (Form 1041), line 18b, column (2) (as refigured for the AMT, if necessary). If you didn't complete Schedule D for the regular tax or the AMT, enter -0-	<b>59</b>	
<b>60</b>	If you didn't complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 58. Otherwise, add lines 58 and 59 and enter the <b>smaller</b> of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary)	<b>60</b>	
<b>61</b>	Enter the <b>smaller</b> of line 57 or line 60	<b>61</b>	
<b>62</b>	Subtract line 61 from line 57	<b>62</b>	
<b>63</b>	If line 62 is \$191,100 or less, multiply line 62 by 26% (0.26). Otherwise, multiply line 62 by 28% (0.28) and subtract \$3,822 from the result	<b>63</b>	
<b>64</b>	Maximum amount subject to the 0% rate	<b>64</b>	2,600
<b>65</b>	Enter the amount from line 27 of Schedule D (Form 1041), line 14 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as figured for the regular tax). If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 22; if zero or less, enter -0-	<b>65</b>	
<b>66</b>	Subtract line 65 from line 64. If zero or less, enter -0-	<b>66</b>	
<b>67</b>	Enter the <b>smaller</b> of line 57 or line 58	<b>67</b>	
<b>68</b>	Enter the <b>smaller</b> of line 66 or line 67. This amount is taxed at 0%	<b>68</b>	
<b>69</b>	Subtract line 68 from line 67	<b>69</b>	

**Part IV Line 52 Computation Using Maximum Capital Gains Rates** *(continued)*

<b>70</b>	Maximum amount subject to rates below 20% .....	<b>70</b>		
<b>71</b>	Enter the amount from line 66 .....	<b>71</b>		
<b>72</b>	Enter the amount from line 27 of Schedule D (Form 1041), line 18 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet, whichever applies (as figured for the regular tax). If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 22; if zero or less, enter -0- .....	<b>72</b>		
<b>73</b>	Add line 71 and line 72 .....	<b>73</b>		
<b>74</b>	Subtract line 73 from line 70. If zero or less, enter -0- .....	<b>74</b>		
<b>75</b>	Enter the <b>smaller</b> of line 69 or 74 .....	<b>75</b>		
<b>76</b>	Multiply line 75 by 15% (0.15) .....			<b>76</b>
<b>77</b>	Add lines 68 and 75 .....	<b>77</b>		
<b>If lines 77 and 57 are the same, skip lines 78 through 82 and go to line 83. Otherwise, go to line 78.</b>				
<b>78</b>	Subtract line 77 from line 67 .....	<b>78</b>		
<b>79</b>	Multiply line 78 by 20% (0.20) .....			<b>79</b>
<b>If line 59 is zero or blank, skip lines 80 through 82 and go to line 83. Otherwise, go to line 80.</b>				
<b>80</b>	Add lines 62, 77, and 78 .....	<b>80</b>		
<b>81</b>	Subtract line 80 from line 57 .....	<b>81</b>		
<b>82</b>	Multiply line 81 by 25% (0.25) .....			<b>82</b>
<b>83</b>	Add lines 63, 76, 79, and 82 .....			<b>83</b>
<b>84</b>	If line 57 is \$191,100 or less, multiply line 57 by 26% (0.26). Otherwise, multiply line 57 by 28% (0.28) and subtract \$3,822 from the result .....			<b>84</b>
<b>85</b>	Enter the <b>smaller</b> of line 83 or line 84 here and on line 52 .....			<b>85</b>

**SCHEDULE D  
(Form 1041)**

**Capital Gains and Losses**

OMB No. 1545-0092

u Attach to Form 1041, Form 5227, or Form 990-T.

u Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.  
uGo to [www.irs.gov/F1041](http://www.irs.gov/F1041) for instructions and the latest information.

**2018**

Department of the Treasury  
Internal Revenue Service

Name of estate or trust

Employer identification number

The Estate of Walt Disney

58-9999999

Note: Form 5227 filers need to complete only Parts I and II.

**Part I Short-Term Capital Gains and Losses (See instructions)**

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>1a</b> Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b . . . . .				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .				
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .				
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .				
<b>4</b> Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .				<b>4</b>
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .				<b>5</b>
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2017 Capital Loss Carryover Worksheet . . . . .				<b>6</b> ( )
<b>7 Net short-term capital gain or (loss).</b> Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on the back . . . . . <b>u</b>				<b>7</b>

**Part II Long-Term Capital Gains and Losses (See instructions)**

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b> Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b . . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .				
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .	73,928			73,928
<b>11</b> Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .				<b>11</b>
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .				<b>12</b>
<b>13</b> Capital gain distributions . . . . .				<b>13</b>
<b>14</b> Gain from Form 4797, Part I . . . . .				<b>14</b>
<b>15</b> Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2017 Capital Loss Carryover Worksheet . . . . .				<b>15</b> ( )
<b>16 Net long-term capital gain or (loss).</b> Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on the back . . . . . <b>u</b>				<b>16</b> 73,928

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2018

<b>Part III Summary of Parts I and II</b>		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
<b>Caution:</b> Read the instructions before completing this part.				
17	Net short-term gain or (loss)	17		
18	<b>Net long-term gain or (loss):</b>			
a	Total for year Exp. 10,238	18a	73,928	73,928
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	18b		
c	28% rate gain	18c		
19	<b>Total net gain or (loss).</b> Combine lines 17 and 18a u	19	73,928	73,928

**Note:** If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

<b>Part IV Capital Loss Limitation</b>		20
20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the <b>smaller</b> of:	( )
a	The loss on line 19, column (3) or b \$3,000	

**Note:** If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 38), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

**Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part **only** if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

**Form 990-T trusts.** Complete this part **only** if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)	21		
22	Enter the <b>smaller</b> of line 18a or 19 in column (2) but not less than zero	22		
23	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	23		
24	Add lines 22 and 23	24		
25	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- u	25		
26	Subtract line 25 from line 24. If zero or less, enter -0-	26		
27	Subtract line 26 from line 21. If zero or less, enter -0-	27		
28	Enter the <b>smaller</b> of the amount on line 21 or \$2,600	28		
29	Enter the <b>smaller</b> of the amount on line 27 or line 28	29		
30	Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% u	30		
31	Enter the <b>smaller</b> of line 21 or line 26	31		
32	Subtract line 30 from line 26	32		
33	Enter the <b>smaller</b> of line 21 or \$12,700	33		
34	Add lines 27 and 30	34		
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		
36	Enter the <b>smaller</b> of line 32 or line 35	36		
37	Multiply line 36 by 15% (0.15) u	37		
38	Enter the amount from line 31	38		
39	Add lines 30 and 36	39		
40	Subtract line 39 from line 38. If zero or less, enter -0-	40		
41	Multiply line 40 by 20% (0.20) u	41		
42	Figure the tax on the amount on line 27. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42		
43	Add lines 37, 41, and 42	43		
44	Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44		
45	<b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 40) u	45		

**Net Investment Income Tax—  
Individuals, Estates, and Trusts**

**2018**

Department of the Treasury  
Internal Revenue Service (99)

u Attach to your tax return.

u Go to [www.irs.gov/Form8960](http://www.irs.gov/Form8960) for instructions and the latest information.

Attachment  
Sequence No. **72**

Name(s) shown on your tax return

Your social security number or EIN

The Estate of Walt Disney

58-9999999

<b>Part I Investment Income</b>					
		<input type="checkbox"/> Section 6013(g) election (see instructions)			
		<input type="checkbox"/> Section 6013(h) election (see instructions)			
		<input type="checkbox"/> Regulations section 1.1411-10(g) election (see instructions)			
<b>1</b>	Taxable interest (see instructions)			<b>1</b>	9,182
<b>2</b>	Ordinary dividends (see instructions)			<b>2</b>	53,369
<b>3</b>	Annuities (see instructions)			<b>3</b>	
<b>4a</b>	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	<b>4a</b>	-8,842		
<b>b</b>	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	<b>4b</b>			
<b>c</b>	Combine lines 4a and 4b			<b>4c</b>	-8,842
<b>5a</b>	Net gain or loss from disposition of property (see instructions)	<b>5a</b>	73,928		
<b>b</b>	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	<b>5b</b>			
<b>c</b>	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	<b>5c</b>			
<b>d</b>	Combine lines 5a through 5c			<b>5d</b>	73,928
<b>6</b>	Adjustments to investment income for certain CFCs and PFICs (see instructions)			<b>6</b>	
<b>7</b>	Other modifications to investment income (see instructions)			<b>7</b>	
<b>8</b>	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7			<b>8</b>	127,637
<b>Part II Investment Expenses Allocable to Investment Income and Modifications</b>					
<b>9a</b>	Investment interest expenses (see instructions)	<b>9a</b>			
<b>b</b>	State, local, and foreign income tax (see instructions)	<b>9b</b>	574		
<b>c</b>	Miscellaneous investment expenses (see instructions)	<b>9c</b>			
<b>d</b>	Add lines 9a, 9b, and 9c			<b>9d</b>	574
<b>10</b>	Additional modifications (see instructions)			<b>10</b>	17,780
<b>11</b>	Total deductions and modifications. Add lines 9d and 10			<b>11</b>	18,354
<b>Part III Tax Computation</b>					
<b>12</b>	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals complete lines 13–17. Estates and trusts, complete lines 18a–21. If zero or less, enter -0-			<b>12</b>	109,283
<b>Individuals:</b>					
<b>13</b>	Modified adjusted gross income (see instructions)	<b>13</b>			
<b>14</b>	Threshold based on filing status (see instructions)	<b>14</b>			
<b>15</b>	Subtract line 14 from line 13. If zero or less, enter -0-	<b>15</b>			
<b>16</b>	Enter the smaller of line 12 or line 15			<b>16</b>	
<b>17</b>	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions)			<b>17</b>	
<b>Estates and Trusts:</b>					
<b>18a</b>	Net investment income (line 12 above)	<b>18a</b>	109,283		
<b>b</b>	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	<b>18b</b>	109,283		
<b>c</b>	Undistributed net investment income. Subtract line 18b from 18a (see instructions). If zero or less, enter -0-	<b>18c</b>			
<b>19a</b>	Adjusted gross income (see instructions)	<b>19a</b>	84,494		
<b>b</b>	Highest tax bracket for estates and trusts for the year (see instructions)	<b>19b</b>	12,500		
<b>c</b>	Subtract line 19b from line 19a. If zero or less, enter -0-	<b>19c</b>	71,994		
<b>20</b>	Enter the smaller of line 18c or line 19c			<b>20</b>	
<b>21</b>	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions)			<b>21</b>	



**SCHEDULE E  
(Form 1040)**

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

**u Attach to Form 1040, 1040NR, or Form 1041.**

**u Go to [www.irs.gov/ScheduleE](http://www.irs.gov/ScheduleE) for instructions and the latest information.**

OMB No. 1545-0074

**2018**

Attachment Sequence No. **13**

Department of the Treasury  
Internal Revenue Service (99)

Name(s) shown on return

Your social security number

The Estate of Walt Disney

58-9999999

**Part I Income or Loss From Rental Real Estate and Royalties** **Note:** If you are in the business of renting personal property, use **Schedule C or C-EZ** (see instructions). If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

**A** Did you make any payments in 2018 that would require you to file Form(s) 1099? (see instructions)  Yes  No  
**B** If "Yes," did you or will you file required Forms 1099?  Yes  No

**1a** Physical address of each property (street, city, state, ZIP code)  
**A**  
**B**  
**C**

1b	Type of Property (from list below)	2	For each rental real estate property listed above, report the number of fair rental and personal use days. Check the <b>QJV</b> box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days		Personal Use Days		QJV	
				A	B	A	B	A	B
A	8								
B									
C									

**Type of Property:**

- 1 Single Family Residence    3 Vacation/Short-Term Rental    5 Land    7 Self-Rental
- 2 Multi-Family Residence    4 Commercial    6 Royalties    8 Other (describe)

Income:	Properties:	A	B	C
<b>3</b> Rents received	<b>3</b>			
<b>4</b> Royalties received	<b>4</b>			
<b>Expenses:</b>				
<b>5</b> Advertising	<b>5</b>	8,842		
<b>6</b> Auto and travel (see instructions)	<b>6</b>			
<b>7</b> Cleaning and maintenance	<b>7</b>			
<b>8</b> Commissions	<b>8</b>			
<b>9</b> Insurance	<b>9</b>			
<b>10</b> Legal and other professional fees	<b>10</b>			
<b>11</b> Management fees	<b>11</b>			
<b>12</b> Mortgage interest paid to banks, etc. (see instructions)	<b>12</b>			
<b>13</b> Other interest	<b>13</b>			
<b>14</b> Repairs	<b>14</b>			
<b>15</b> Supplies	<b>15</b>			
<b>16</b> Taxes	<b>16</b>			
<b>17</b> Utilities	<b>17</b>			
<b>18</b> Depreciation expense or depletion	<b>18</b>			
<b>19</b> Other (list <b>u</b> )	<b>19</b>			
<b>20</b> Total expenses. Add lines 5 through 19	<b>20</b>	8,842		
<b>21</b> Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file <b>Form 6198</b>	<b>21</b>	-8,842		
<b>22</b> Deductible rental real estate loss after limitation, if any, on <b>Form 8582</b> (see instructions)	<b>22</b>	8,842		
<b>23a</b> Total of all amounts reported on line 3 for all rental properties	<b>23a</b>			
<b>b</b> Total of all amounts reported on line 4 for all royalty properties	<b>23b</b>			
<b>c</b> Total of all amounts reported on line 12 for all properties	<b>23c</b>			
<b>d</b> Total of all amounts reported on line 18 for all properties	<b>23d</b>			
<b>e</b> Total of all amounts reported on line 20 for all properties	<b>23e</b>	8,842		
<b>24</b> <b>Income.</b> Add positive amounts shown on line 21. <b>Do not</b> include any losses	<b>24</b>			0
<b>25</b> <b>Losses.</b> Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	<b>25</b>			8,842
<b>26</b> <b>Total rental real estate and royalty income or (loss).</b> Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	<b>26</b>			-8,842

**For Paperwork Reduction Act Notice, see the separate instructions.**

Beneficiary 1  
Schedule K-1  
(Form 1041)

2018

For calendar year 2018, or tax year

Department of the Treasury  
Internal Revenue Service

Final K-1

Amended K-1

661117  
OMB No. 1545-0092

beginning  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  
58-9999999

B Estate's or trust's name  
The Estate of Walt Disney

C Fiduciary's name, address, city, state, and ZIP code  
Fid Name  
Fid Manager  
1 Mickey Way  
Anahiem CA 19379

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  
123-12-2222

G Beneficiary's name, address, city, state, and ZIP code  
Melanie June  
3418 Rafferty Dr  
NEW YORK NY 10002

H  Domestic beneficiary  Foreign beneficiary

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

1	Interest income	3,944	11	Final year deductions
2a	Ordinary dividends	41,649		
2b	Qualified dividends			
3	Net short-term capital gain			
4a	Net long-term capital gain	63,690		
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
			E *	45,593 STMT
10	Estate tax deduction		I *	STMT

\*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



Name  <u>THE ESTATE OF WALT DISNEY</u>	Employer Identification Number  <u>58-9999999</u>
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**Electronic Funds Withdrawal or Direct Deposit**

This record is included with the South Carolina electronic file for taxpayers who elect to pay their tax balance by electronic funds withdrawal or who choose to have their refund deposited directly into their bank account

Electronic Funds Withdrawal (Direct Debit) .....	<input type="checkbox"/>
Direct Deposit of Refund .....	<input checked="" type="checkbox"/>
Routing Transit Number .....	<u>041000124</u>
Bank Account Number .....	<u>12315212</u>
Type of Account .....	<u>CHECKING</u>
Taxpayer Phone Number .....	_____
Requested Payment Date .....	_____
Amount of Tax Payment .....	_____
Refund to be Deposited .....	<u>410</u>

**DO NOT SUBMIT THIS DOCUMENT TO THE SOUTH CAROLINA DEPARTMENT OF REVENUE**

Name <b>THE ESTATE OF WALT DISNEY</b>	Taxpayer Identification Number <b>58-9999999</b>
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**Municipal and Related Exempt Income and Expenses Reported on Federal Return**

	Instate	Outstate	Total
Tax-exempt interest income .....	_____	_____	_____
Allocation percentage .....	_____	_____	_____
Total expenses .....	_____	_____	_____
Less: state income taxes .....	_____	_____	_____
Subtotal .....	_____	_____	_____
<b>Net tax-exempt interest income</b> .....	=====	=====	=====

	Instate	Outstate	Total
Tax-exempt dividend income .....	_____	_____	_____
Allocation percentage .....	_____	_____	_____
Total expenses .....	_____	_____	_____
Less: state income taxes .....	_____	_____	_____
Subtotal .....	_____	_____	_____
<b>Net tax-exempt dividend income</b> .....	=====	=====	=====

Net tax-exempt income is reported on Form SC1041, Page 2, Part I, line 1a.

**U.S. Obligations - Income and Expense**

	Interest	Dividends	Total
Gross income from U.S. obligations .....	3,944	_____	3,944
Expenses allocable to U.S. obligations .....	_____	_____	_____
Less: state income taxes .....	_____	_____	_____
Subtotal .....	_____	_____	_____
<b>Net income from U.S. obligations</b> .....	=====	=====	=====

Net income from U.S. obligations is reported on Form SC1041, Page 2, Part I, line 2a.

For calendar year 2018, or tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

Name

Taxpayer Identification Number

**THE ESTATE OF WALT DISNEY**

**58-9999999**

	Interest	Dividends	Other
<b>Total income</b> .....	2		
Interest .....			
Taxes .....			
Fiduciary fees .....			
Charitable deduction .....			
Attorney and accountant fees .....			
Other deductions .....			
Misc. deductions subject to 2% .....			
<b>Total deductions</b> .....			
Net income before loss reclassification .....	2		
Reclassified losses .....			
<b>Net income</b> .....	2		
<b>Net income (Force)</b> .....			

	Business	Rental Real Estate	Other Rental
<b>Total income</b> .....			
Interest .....			
Taxes .....			
Fiduciary fees .....			
Charitable deduction .....			
Attorney and accountant fees .....			
Other deductions .....			
Misc. deductions subject to 2% .....			
<b>Total deductions</b> .....			
Net income before loss reclassification .....			
Reclassified losses .....			
<b>Net income</b> .....			
<b>Net income (Force)</b> .....			

	Short-Term Gains	Long-Term Gains
<b>Total income</b> .....		8,340
Interest .....		
Taxes .....		486
Fiduciary fees .....		
Charitable deduction .....		
Attorney and accountant fees .....		629
Other deductions .....		4
Misc. deductions subject to 2% .....		
<b>Total deductions</b> .....		1,119
<b>Net income</b> .....		7,221
<b>Net income (Force)</b> .....		