

STATE OF SOUTH CAROLINA

DEPARTMENT OF REVENUE

FIDUCIARY INCOME TAX RETURN

SC1041 (Rev. 10/11/17)

		ГІО	<u>UCIAI</u>	KI INCOI		<u> </u>	LIUN	IA		3	084	
For the ca	alendar year 201	7 or Fiscal Taxable	Year Begin	ning	and	ending					<u>20</u>	<u>)17</u>
Name of I	Estate or Trust						FEIN					
		SAM WALTON	ESTATE				} 56-	999	9999			
Name and	Title of Fiduciary	JUNE BUG		Mailing Address		City			State 2	ZIP Code	County Co	de de
		TITLE		1180 DUTCH FORK RO	ΔΩ	BALLEN	TINE		AR .	47002	Out of SC	
ATTACH			ΔΝΟ ΔΙΙ Ι΄	TS SCHEDULES, II		_		Fyt		Requested:		
A. Check		TRAL TORRIN 1041		st, check whether:		check if:	LLO IV II	LAU		•	ibution of as	
_	Idress change	Cimple truct		•				-1	1		uring the yea	
, —	-	Simple trust		Testamentary			estate or tru		~~	7		
, 	nended return	Complex trust		Inter vivos	X	Nonreside	nt estate or	trust	L	Yes	X No	
'⊢		state X Grantor Trust										
Ele	ecting Small Busi	iness Trust										
E. During	g this taxable yea	ar, was this estate of	r trust notifi	ied of any federal c	nange for a	ny prior ye	ears?	YES o	or X 1	NO If YES, a	attach copy.	
F. Is a fe	deral Schedule K-1	attached for each ber	eficiary?	YES or NO	f YES, how r	nany?	N/A			If NO,	attach explana	ation.
If a NONR	ESIDENT estate of	or trust with income	from both S	outh Carolina and N	on-South C	arolina sou	ırces - comp	lete an	d attach	Part III, page	3 of SC1041	ī
1. FEDE	RAL TAXABLE	INCOME (Residents:	Federal For	m 1041; Nonresidents	line 22, col	umn D, Pai	rt III)		} 1			00
		nption included in lir							ء ا	2		00
	•	•		ed to principal or re								\Box
		ne (attach explanati							3	3		00
		C Fiduciary Adjustn		ine 1i Part II)	Addition		traction		4			00
	•		,	D: REG. 1.			ALL IT	 שידיתי				00
							E GRAN					+
				ATTRIB						_		00
				UNDER I		- 6/						00
				mputation schedule			REPORT	:ED	1	3		00
				ive Trade or Busine	ss Income	(I-335) _{. on}	attached sch.		\{\begin{array}{c} \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\	9		00
10. Less	NON-REFUNDA	BLE CREDITS (atta	ach SC1040	OTC)					} <u>10</u>) <		00
11. Comb	ine lines 8 - 10 a	and enter the result	here BUT	NOT LESS THAN	ZERO				1	1		00
12. South	Carolina income	e tax withheld for no	onresident b	peneficiaries (From	Part IV)				} 12	2	5,730	00
	· · · · · · · · · · · · · · · · · · ·	s 11 and 12 and en		<u></u>	<u></u>				} 13	3	5,730	00
14. Amount with: (a)	paid }	00	o) SC Vithholding }		00		Er	nter tot	al } 14	4		00
	Payments: (a)			applied from 2016 return: (b)	}	1,2	260 00 Er	nter tot	al }	5	4,760	00
									16	3	4,760	00
17. Overp	ayment (line 16	less line 13)		· · · · · · · · · · · · · · · · · · ·					} 17		· · · · · · · · · · · · · · · · · · ·	00
18. Late Fi	iling and/or late pay	yment: Penalties }		00 Interes	st }			r total h	nere 18	3		00
			ax (Attach	SC2210)					} 19			00
		ess line 16 plus line							— ا			
		rtment of Revenue		, appoab.o/			BALANC	F DUE	} 20	,	970	
,	•	e credited to 2018	 Fetimated T				•		} 2		7,0	00
				ne amount to be ref				FUND	- ≺ -	1		00
ZZ. NELK				are true, correct and		o the best						100
Diana	3	iis return and an at	aciiiieiiis a	le tide, correct and	complete		t of fifty Kilov	vieuge	and bei	ici.		
Please	Signature of	fiducion, or officer	onrocontino	r fiducion.			novor'o Em	sil .				
Sign		fiduciary or officer		-		Тах	payer's Ema		. 5:.			$\overline{}$
Here		•		nue or delegate to dis		res		reparer	's Printe	d Name		
	return, attachmer	nts and related tax ma	atters with the	e preparer.								لب
	Preparer's				Date		Check if		7.7		lephone num	nber
Paid	signature }	JEREMIAH GILL				8/18	self-employ		X	800-96	<u>3-8900</u>	
Preparer's	Firm's name	1		MFIRMFIRMF					PTIN o	_		
Use Only	(or yours if self-employed)	AADDRES	SADDR	ESSADDRESS	ADDRES	SSADDI	RESSADI	DΑ	FEIN	} P1234	5678ء	_
	and address	ACITYCIT	YCITYCI	TYCIA, MI					ZIP Co	de } 481	30-1234	_



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 c. Federal net operating loss carryover 1c 1d d. Out-of state losses e. Other additions to income (see instr.) - ATT. AN EXPLANATION 1e Total additions to federal income (add lines 1a through 1e) 1f 2. Subtractions from federal taxable income a. Interest on US Government obligations 2a 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. Total (subtract line 2f from line 1f) 3 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 or Subtraction 5

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.	Shares of F Distributable No	Shares of South Carolina Fiduciary Adjustment Addition or Subtraction	
Social Security Number	2. Amount	3. Percent	
a.		%	
b.		%	
C.		%	
d.		%	
e.		%	
f.		%	
g.		%	
h.		%	
i. Fiduciary		%	
Totals		100%	

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.

Under South Carolina law the executor, administrator or other fiduciary of an estate or trust is required to withhold 7% of the amount of South Carolina taxable income distributable to each nonresident beneficiary. The amount withheld from each beneficiary will be reflected on column F, Part IV, page 3 of SC1041. Complete an SC41 for each beneficiary from whom an amount is withheld. Be sure to insert current year in space.

The SC41 may be submitted with the SC1041 or separately. If mailing separately, mail to SC Department of Revenue, Taxable Fiduciary, Columbia, SC 29214-0038.

Copy - to the beneficiary from whom the tax is withheld so that the beneficiary may attach it to his or her South Carolina income tax return.

Copy - to the beneficiary for his records.

Copy - to be retained by the fiduciary.

The amount of tax withheld by the fiduciary should be claimed as SOUTH CAROLINA INCOME TAX WITHHELD on the SC Income Tax Return. Note: Any estimated income tax payments assigned to beneficiaries must be reported to them on SC41, along with instructions to enter this amount as tax withheld on their South Carolina income tax return. SC41 must be attached to the beneficiary's return to claim this payment.

		c	UT HERE		
SC41 1022		PORT OF NONRE	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WITHH R TRUST'S TAX YEAR	ELD	20 <u>18</u>
Nonresident Beneficiary's Name		SN 00 F101	NAME OF ESTATE OR TRUST		FEIN
	4	00-00-5101			56-9999999
EMILY WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	С	ounty	NONRESIDENT BENEFICIARY'S SHARE	OF DIS	STRIBUTABLE
			INCOME FROM SOUTH CAROLINA SOU	RCES:	
_38387 WEST MAI	N ST.		Ordinary Income	\$	20,236.00
City	State	ZIP Code	Long-term Capital Gain		
MANHATTEN	NY 1	0002	Short-term Capital Gain Amount of Tax Withheld	💲	1 422 00
MANHATIEN	IN Y I	.0002	Amount of Tax Withheld	\$	1,433.00
Nonresident Beneficiary's Name	e S	sn 00-00-5101	NAME OF ESTATE OR TRUST		FEIN 56-999999
EMILY WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	С	ounty	NONRESIDENT BENEFICIARY'S SHARE	OF DIS	STRIBUTABLE
		·	INCOME FROM SOUTH CAROLINA SOU	RCES:	
_38387 WEST MAI	N ST.		Ordinary Income		
City	State	ZIP Code	Long-term Capital Gain		
MANATITA COCOTANT	NTS7 1	0000	Short-term Capital Gain	\$_	1 422 00
MANHATTEN	NY 1	.0002	Amount of Tax Withheld	\$	1,433.00
SC41 LD22 Nonresident Beneficiary's Name	ENDING DA	STATE OF SOUT	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WITHF TRUST'S TAX YEAR NAME OF ESTATE OR TRUST		20 18
Nonesiacia Berendary 3 Name		00-00-5101	NAME OF ESTATE ON TROOT		56-9999999
EMILY WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	С	ounty	NONRESIDENT BENEFICIARY'S SHARE INCOME FROM SOUTH CAROLINA SOU	-	STRIBUTABLE
38387 WEST MAI	N ST.		Ordinary Income	•	20,236.00
City	State	ZIP Code	Long-term Capital Gain	\$.00.
		0000	Short-term Capital Gain	\$_	.00.
MANHATTEN	NY 1	.0002	Amount of Tax Withheld	\$	1,433.00

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			UT HERE — — — — — — — —		
SC41 1022		PORT OF NONRE	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WITHHE R TRUST'S TAX YEAR	LD	20 _18
Nonresident Beneficiary's Name		ssn 100-00-5102	NAME OF ESTATE OR TRUST		FEIN 56-999999
JACOB WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	C	County	NONRESIDENT BENEFICIARY'S SHARE O INCOME FROM SOUTH CAROLINA SOURCE	_	STRIBUTABLE
1222 MAIN			Ordinary Income	\$_	20,236.00
City	State	ZIP Code	Long-term Capital Gain	\$ _	.00
M7 T	GO.	E0101	Short-term Capital Gain	\$ _	.00
MAI	CO :	52121	Amount of Tax Withheld	_\$	1,433.00
Nonresident Beneficiary's Name	e S	ssn 400-00-5102	NAME OF ESTATE OR TRUST		FEIN 56-9999999
20.000.00.00		-			
JACOB WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	C	County	NONRESIDENT BENEFICIARY'S SHARE O INCOME FROM SOUTH CAROLINA SOURCE	CES:	
1222 MAIN		710.0.1	Ordinary Income		
City	State	ZIP Code	Long-term Capital Gain Short-term Capital Gain	* _	.00 .00
MAI	CO !	52121	Amount of Tax Withheld	* — \$	1,433.00
SC41		STATE OF SOUTI	UT HERE — — — — — — — — — — — — — — — — — —	LD	20 _18
Nonresident Beneficiary's Name		ssn 100-00-5102	NAME OF ESTATE OR TRUST		FEIN 56-9999999
JACOB WATSON			SAM WALTON ESTATE		
Street Address or Rural Route	C	County	NONRESIDENT BENEFICIARY'S SHARE O	_	STRIBUTABLE
1222 MAIN			Ordinary Income		20,236.00
City	State	ZIP Code	Long-term Capital Gain	\$_	.00
147 T		F 0 1 0 1	Short-term Capital Gain		.00
MAI	CO	52121	Amount of Tax Withheld	\$	1,433.00

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SC41		EPORT OF NONRE	H CAROLINA - INCOME TAX SIDENT BENEFICIARY TAX WIT TRUST'S TAX YEAR	HHELD	20 <u>18</u>
Nonresident Beneficiary's Name		ssn 400-00-5103	NAME OF ESTATE OR TRUST	56	FEIN 5-9999999
MAGGIE WALTON			SAM WALTON ESTATE		
Street Address or Rural Route		County	NONRESIDENT BENEFICIARY'S SHA INCOME FROM SOUTH CAROLINA S		IBUTABLE
9901 LOVEJOY			Ordinary Income		
City	State	ZIP Code	Long-term Capital Gain	\$.00.
BYRON	МТ	48418	Short-term Capital Gain	\$.00 1,432.00
DIRON	141 1	40410	Amount of Tax Withheld	Ф	1,432.00
Nonresident Beneficiary's Name	,	SSN 400-00-5103	NAME OF ESTATE OR TRUST	56	FEIN 5-9999999
W1 GGT		100 00 3103	GIM HILL HOW EGHINE	30	, ,,,,,,,
MAGGIE WALTON Street Address or Rural Route		County	SAM WALTON ESTATE NONRESIDENT BENEFICIARY'S SHA	RE OF DISTR	PIRI ITΔRI F
Officer Address of Adrai Address		County	INCOME FROM SOUTH CAROLINA S		IIDOTABLE
9901 LOVEJOY			Ordinary Income	\$	20,236.00
City	State	ZIP Code	Long-term Capital Gain	\$.00
DVDON	NAT	40410	Short-term Capital Gain	\$.00
BYRON	IVI 1	48418	Amount of Tax Withheld	\$	1,432.00
SC41		STATE OF SOUTI	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WIT	THHELD	20 <u>18</u>
Nonresident Beneficiary's Name	,	ssn 400-00-5103	NAME OF ESTATE OR TRUST	56	FEIN 5-9999999
MAGGIE WALTON			SAM WALTON ESTATE		
Street Address or Rural Route		County	NONRESIDENT BENEFICIARY'S SHA INCOME FROM SOUTH CAROLINA S		
9901 LOVEJOY			Ordinary Income	\$	
City	State	ZIP Code	Long-term Capital Gain	\$.00 .00
BYRON	МТ	48418	Short-term Capital Gain Amount of Tax Withheld	\$	

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		— — — cı	UT HERE — — — — — — — —		
SC41 F		PORT OF NONRE	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WITHH R TRUST'S TAX YEAR	ELD	20 _18
Nonresident Beneficiary's Name		SN 00 00 F104	NAME OF ESTATE OR TRUST		FEIN
	4	00-00-5104			56-9999999
IKE WALTON			SAM WALTON ESTATE		
Street Address or Rural Route	Co	ounty	NONRESIDENT BENEFICIARY'S SHARE	OF DIS	STRIBUTABLE
			INCOME FROM SOUTH CAROLINA SOUI		
3242 DEXTER AVE			Ordinary Income	. \$_	20,236.00
City	State	ZIP Code	Long-term Capital Gain		
DEXTER	MI 4	7108	Short-term Capital Gain Amount of Tax Withheld	\$_	.00 1 432 no
DEXIER	INT T	7100	Amount of Tax Withheld	<u>.</u> •	1,432.00
Nonresident Beneficiary's Name	SS	SN	NAME OF ESTATE OR TRUST		FEIN
THE HALBON	4	00-00-5104	CAM MALEON ECENEE		56-9999999
IKE WALTON Street Address or Rural Route		ounty	SAM WALTON ESTATE NONRESIDENT BENEFICIARY'S SHARE	OE DIS	PTDIDI ITADI E
Street Address of Kurai Kodie	C	Julity	INCOME FROM SOUTH CAROLINA SOUI		TRIBUTABLE
3242 DEXTER AVE			Ordinary Income		20,236.00
City	State	ZIP Code	Long-term Capital Gain	\$.00
	_		Short-term Capital Gain	\$.00
DEXTER	MI 4	7108	Amount of Tax Withheld	. \$	1,432.00
7055	ENDING DA	STATE OF SOUTI PORT OF NONRI ITE OF ESTATE'S OR	H CAROLINA - INCOME TAX ESIDENT BENEFICIARY TAX WITHH R TRUST'S TAX YEAR	IELD	20 18
Nonresident Beneficiary's Name		6N 00-00-5104	NAME OF ESTATE OR TRUST		FEIN 56-9999999
IKE WALTON			SAM WALTON ESTATE		
Street Address or Rural Route	Co	ounty	NONRESIDENT BENEFICIARY'S SHARE		STRIBUTABLE
2040 DUVERDO ATTE			INCOME FROM SOUTH CAROLINA SOUI	RCES:	00 000 00
3242 DEXTER AVE		ZIP Code	Ordinary Income		20,236.00 .00
City	State	ZIF CUUE	Long-term Capital Gain Short-term Capital Gain		.00
DEXTER	MI 4	7108	Amount of Tax Withheld	. \$	1,432.00

Form SC1041			2018			
	For calendar year 2018, or tax year beginning	, and ending				
Name of trust			X Amended			
SAM WALTON			Final			
	mber ▶ 400-00-5101	Trust's EIN ▶ 56-9999999				
Grantor's name, address,	and ZIP code	Fiduciary's name, address, and ZIP code				
EMILY WATSON 38387 WEST N MANHATTEN		SAM WALTON ESTATE 1180 DUTCH FORK ROAD BALLENTINE AR 47002				
	Enter the following items on the South Carolina in	ncome tax return of the above named individual.				
_	ons:	Source Income: Interest Dividends Business				
Income taxes deducte Federal net operating Out of state losses Federal estate tax	d on federal Form 1041 1,190 loss carryover djustment	Short-term capital gain				
Other additions Subtractions: U.S. obligations: Income Expenses State income tax refure Out of state income South Carolina net op South Carolina estate Bonus depreciation a	nds perating loss carryover tax djustment 1,324	Other Expenses Nonresident withholding				

Credits:

Form SC1041		2018			
For calendar year 2018, or tax year beginning	, and ending				
Name of trust		X Amended			
		<u> </u>			
SAM WALTON ESTATE		Final			
Grantor's identifying number ▶ 400-00-5102	Trust's EIN ▶ 56-9999999				
Grantor's name, address, and ZIP code	Fiduciary's name, address, and ZIP code				
JACOB WATSON	SAM WALTON ESTATE				
1222 MAIN	1180 DUTCH FORK ROAD				
MAI CO 52121	BALLENTINE AR 47	002			
Enter the following items on the South Carolina i	income tax return of the above named individual.				
Additions:	Source Income:				
Other states' obligations:	Interest				
Interest / dividends	Dividends				
Expenses	Business	20,236			
Income taxes deducted on federal Form 1041 1,190	-				
Federal net operating loss carryover	Long-term capital gain				
Out of state losses	Rents / royalties / partnerships / estates				
Federal estate tax	Farm				
Bonus depreciation adjustment	Ordinary gains				
Other additions	Other				
Subtractions:	Expenses				
U.S. obligations:	Nonresident withholding	1,433			
Income	_				
Expenses	_				
State income tax refunds					
Out of state income					
South Carolina net operating loss carryover					
South Carolina estate tax					
Bonus depreciation adjustment					
Other subtractions1,103	.				
0.15					

Credits:

Form SC1041				2018			
	For calendar year 2018, or tax year beg	inning	, and ending				
Name of trust				X Amended			
SAM WALTON				Final			
	umber ▶ 400-00-5103		Trust's EIN ▶ 56-9999999				
Grantor's name, address	, and ZIP code		Fiduciary's name, address, and ZIP code				
MAGGIE WALT	_		SAM WALTON ESTATE				
9901 LOVEJC			1180 DUTCH FORK ROAD				
BYRON	MI 48418		BALLENTINE AR 47	7002			
	Enter the following items on the South Ca	rolina ind	come tax return of the above named individual.				
Additions:			Source Income:				
Other states' obligati			Interest				
Interest / dividends	·		Dividends				
Expenses			Business	20,236			
		<u> 190</u>	Short-term capital gain				
	g loss carryover		Long-term capital gain				
Out of state losses			Rents / royalties / partnerships / estates				
Federal estate tax			Farm				
	adjustment		Ordinary gains				
	1,	<u> 324</u>	-				
Subtractions:			Expenses				
U.S. obligations:			Nonresident withholding	1,432			
Income							
Expenses							
State income tax refu	unds						
Out of state income							
South Carolina net of	perating loss carryover						
South Carolina estate	e tax						
Bonus depreciation	adjustment						
	<u>1,</u>	102					

Credits:

Form SC1041			2018			
	For calendar year 2018, or tax year beginning	, and ending				
Name of trust			X Amended			
SAM WALTON			Final			
	mber ▶ 400-00-5104	Trust's EIN ▶ 56-9999999				
Grantor's name, address,	and ZIP code	Fiduciary's name, address, and ZIP code				
IKE WALTON		SAM WALTON ESTATE				
3242 DEXTER		1180 DUTCH FORK ROAD				
DEXTER	MI 47108	BALLENTINE AR 47	7002			
	Enter the following items on the South Carolina	income tax return of the above named individual.				
Additions:		Source Income:				
Other states' obligation		Interest				
_		_ Dividends				
Expenses	ed on federal Form 1041 1,190	Business Short term conital gain				
		- '				
	loss carryover					
Federal estate tay		Farm				
Ronus depreciation a	djustment	_ Farm Ordinary gains				
	1,324	Ordinary gains Other				
Subtractions:		Expenses				
U.S. obligations:		Nonresident withholding	1.432			
J	<u>-</u>					
		-				
State income tax refu	nds	-				
Out of state income		-				
South Carolina net or	perating loss carryover	_				
	tax					
Bonus depreciation a	djustment					
	1,103	5				
0 "						

Credits:

Sc	Charitable Deduction. Don't complete for a simple true	st or a	a pooled income fund	l			
1	Amounts paid or permanently set aside for charitable purposes from gross income. Se	e instru	uctions	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	r charita	able nurnoses	4			
5	Add lines 3 and 4			5			
6	Section 1202 exclusion allocable to capital gains paid or permanently set aside for charitable purpos	ses See	instructions	6			
7	Charitable deduction. Subtract line 6 from line 5. Enter here and on page 1, line 13.			7			
	chedule B Income Distribution Deduction			' '			
1				1			
2	Adjusted total income. See instructions Adjusted tax-exempt interest			2			
_	Total net gain from Schedule D (Form 1041), line 19, column (1). See instructions			3			
3				4			
4	Enter amount from Schedule A, line 4 (minus any allocable section 1202 exclusion)						
5				5			
6 7	Enter any gain from page 1, line 4, as a negative number. If page 1, line 4, is a loss, enter the loss a Distributable net income . Combine lines	is a positi	ive number	6			
	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	Income required to be distributed currently			9			
10	Other amounts paid, credited, or otherwise required to be distributed			10			
11	Total distributions. Add lines 9 and 10. If greater than line 8, see instructions			11			
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			
14	Tentative income distribution deduction. Subtract line 2 from line 7. If zero or less, enter	er -0		14			
<u>15</u>	Income distribution deduction. Enter the smaller of line 13 or line 14 here and on pa	age 1, lir	ne 18	15			
Sc	chedule G Tax Computation (see instructions)						
1	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)						
	d Total. Add lines 1a through 1c		>	1d			
2a	Foreign tax credit. Attach Form 1116						
b	General business credit. Attach Form 3800	2b					
С	Credit for prior year minimum tax. Attach Form 8801	2c					
d	Bond credits. Attach Form 8912	2d					
е	Total credits. Add lines 2a through 2d		•	2e			
3	Subtract line 2e from line 1d. If zero or less, enter -0-			3			
4	Net investment income tax from Form 8960, line 21			4			
5	Net investment income tax from Form 8960, line 21 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		>	7			
	Other Information					Yes	No
1	Did the estate or trust receive tax-exempt income? If "Yes," attach a computation of the allocation of	expense	2S.				Х
	Enter the amount of tax-exempt interest income and exempt-interest dividends ${f u}$ \$						
2	Did the estate or trust receive all or any part of the earnings (salary, wages, and other						
		•					Х
3	At any time during calendar year 2018, did the estate or trust have an interest in or a s						
	over a bank, securities, or other financial account in a foreign country?						Х
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes						
	foreign country u						
4	During the tax year, did the estate or trust receive a distribution from, or was it the gran	ntor 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? I	lf "Yes." :	see				Х
6	the instructions for required attachment If this is an estate or a complex trust making the section 663(b) election, check here. S	 Spp inct	ructions		·····•		- 25
7	To make a section 643(e)(3) election, attach Schedule D (Form 1041), and check here						
8	If the decedent's estate has been onen for more than 2 years, attach an explanation for the delay in	closina					
9	the estate, and check here Are any present or future trust beneficiaries skip persons? See instructions						Х
10	Was the trust a specified domestic entity required to file Form 8938 for the tax year (see						27
.0	Form 8938)?	oc uie i	norradions IOI				Х
							. 41

SCHEDULE C (Form 1040)

Profit or Loss From Business

(Sole Proprietorship)

OMB No. 1545-0074 **2018**

(colo i rophiciorali

u Go to www.irs.gov/ScheduleC for instructions and the latest information. Department of the Treasury Internal Revenue Service 09 u Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065. Social security number (SSN) Name of proprietor Sam Walton Estate Principal business or profession, including product or service (see instructions) Enter code from instructions Business C Business name. If no separate business name, leave blank. Employer ID number (EIN) (see instr.) fdsd 56-9999999 Business address (including suite or room no.) ${f u}$ F City, town or post office, state, and ZIP code F (1) X Cash (2) Accrual (3) Uther (specify) u Accounting method: Did you "materially participate" in the operation of this business during 2018? If "No," see instructions for limit on losses G н Did you make any payments in 2018 that would require you to file Form(s) 1099? (see instructions) No If "Yes," did you or will you file required Forms 1099? . Yes No Income Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked $oxed{u}$ 80,944 Returns and allowances 2 Subtract line 2 from line 1 3 3 Cost of goods sold (from line 42) 4 Gross profit. Subtract line 4 from line 3 5 80,944 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions) 6 Gross income. Add lines 5 and 6 Part II **Expenses.** Enter expenses for business use of your home **only** on line 30. 8 Advertising 8 18 Office expense (see instructions) Pension and profit-sharing plans 19 Car and truck expenses (see instructions) 20 9 Rent or lease (see instructions): Commissions and fees Vehicles, machinery, and equipment 10 10 а Other business property Contract labor (see instructions) 11 11 b 20b Depletion Repairs and maintenance 12 21 21 12 Supplies (not included in Part III) Depreciation and section 179 22 13 22 expense deduction (not 23 Taxes and licenses 23 included in Part III) (see 13 24 Travel and meals: instructions) Employee benefit programs а Travel (other than on line 19) 14 Deductible meals (see Insurance (other than health) 15 15 instructions) Interest (see instructions): 25 16 Utilities Wages (less employment credits) Mortgage (paid to banks, etc.) 26 а 16a b 16b 27a 27a Other expenses (from line 48) 17 b Reserved for future use 17 27b Legal and professional services. **Total expenses** before expenses for business use of home. Add lines 8 through 27a ${f u}$ 28 Tentative profit or (loss). Subtract line 28 from line 7 29 80,944 30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). **Simplified method filers only:** enter the total square footage of: (a) your home: and (b) the part of your home used for business: . Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30 30 Net profit or (loss). Subtract line 30 from line 29. 31 If a profit, enter on both Schedule 1 (Form 1040), line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3. 31 80.944

• If you checked 32b, you must attach Form 6198. Your loss may be limited.

Estates and trusts, enter on Form 1041, line 3.

If you have a loss, check the box that describes your investment in this activity (see instructions).

• If you checked 32a, enter the loss on both **Schedule 1 (Form 1040), line 12** (or **Form 1040NR**,

line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see the line 31 instructions).

• If a loss, you must go to line 32.

at risk

All investment is at risk.

Some investment is not

32a

32b

4044	Grantor / Agency Report	Grantor / Agency Report of Income, Deductions, Credits				
Form 1041	For calendar year 2018, or tax year beginning	, and ending	2018			
Name of trust		, and onening	X Amended			
Sam Waltor			Final			
Grantor's identifying	number ▶ 400-00-5101	Trust's EIN ▶ 56-9999999				
Grantor's name, addre	ess, and ZIP code	Fiduciary's name, address, and ZIP code				
		June Bug				
Emily Watson		Title				
38387 West N		1180 Dutch Fork Road				
Manhatten	NY 10002	Ballentine AR 47002				
	Enter the following items on the federal in	ncome tax return of the above named individual.				
Portfolio Income:		Expenses / Deductions:				
	<u></u>	Investment interest				
Includes from U	J.S. obligations	Other interest				
Dividends	<u></u>	Taxes:				
Includes from q	ualified dividends	State / local taxes (including withholding)				
Includes from U	J.S. obligations	Property taxes paid				
Tax-exempt		Other				
	ated to tax-exempt income	Foreign tax credit				
Capital Gain / Loss		Fiduciary fees				
Short-term		Charitable contributions				
Long-term		Attorney / accountant fees				
Capital gain distril	butions	Early withdrawal penalty				
Net section 1231	50 gain (Sah D Wirk In 5)	Other deductions				
	50 gain (Sch. D Wrk., In. 5)	Medical				
	50 gain (Sch. D Wrk., In. 11)	Utility				
Other Income:	lusion	Other Directly Apportioned Deductions:				
	oe .					
Other	ss	Depreciation Depreciation				
From Pass-Throug	h Entities	Depletion Amortization				
•	gain / loss	Amortization Payments:				
Long-term capital	gain / loss	Endoral actimated toyon paid				
	gain / loss	Federal tax withheld				
Investment expen	ses	Credits:				
Investment income	e adjustment	Alternative Minimum Tax Items:				
Section 179 exper	nse deduction					
Activities:		Nonpassive	Passive			
Business income	/ loss	20,236				
Rental, royalty inc	ome / loss					
Partnership, S cor	p income / loss	······				
Estates, trusts inc	ome / loss	·····				
Farm income / los	SS	·····				
Publicly traded pa	artnerships	·····				
REMIC Schedule	Q income					
Gross farming / fis	shing income					

Form 1041	Grantor / Agency Repo	ort of income, Deductions, Credits	2018
Form 1041	For colondar year 2019, or tay year haginain	a and anding	2010
Name of trust	For calendar year 2018, or tax year beginning	g , and ending	X Amended
varie or trust			Amerided
Sam Walton	Estate		Final
	number ▶ 400-00-5102	Trust's EIN ▶ 56-9999999	1 Iriai
Grantor's name, addres		Fiduciary's name, address, and ZIP code	
	, , , , , , , , , , , , , , , , , , , ,	June Bug	
Jacob Watson		Title	
1222 Main		1180 Dutch Fork Road	
Mai	CO 52121	Ballentine AR 47002	
	Enter the following items on the fede	eral income tax return of the above named individual.	
Portfolio Income:		Expenses / Deductions:	
Interest		Investment interest	
Includes from U.	S. obligations	Other interest	
Dirit I	<u>-</u>	l -	
	alified dividends		1,190
Includes from U.	S. obligations	Property taxes paid	
T	<u></u>	Other and	
	ed to tax-exempt income	Foreign tax credit	
Capital Gain / Loss:		Fiduciary fees	
Short-term		Charitable contributions	
	·····		
Capital gain distrib	utions	Early withdrawal penalty	
Net section 1231		Other deductions	
Unrecap. sec. 1250) gain (Sch. D Wrk., In. 5)	Medical	
) gain (Sch. D Wrk., In. 11)		
Section 1202 exclu	ısion	Other	
Other Income:		Directly Apportioned Deductions:	
Ordinary gain / loss	§	Depreciation	
	·····		
From Pass-Through		Amortization	
Short-term capital	gain / loss	Payments:	
Long-term capital g		Federal estimated taxes paid	
Net section 1231 g	ain / loss	Federal tax withheld	
Investment expens	es	Credits:	
Investment income	adjustment	Alternative Minimum Tax Items:	
Section 179 expen	se deduction	_	
Activities:		Nonpassive	Passive
Business income /	loss	<u>20,236</u>	
Rental, royalty inco	me / loss	<u></u>	
Partnership, S corp	income / loss	······	
Estates, trusts inco	me / loss	<u>-</u>	
Farm income / loss	s	······	
Publicly traded par	tnerships	······	
REMIC Schedule C	Q income		
Gross farming / fisl	hing income		

Form 1041	Grantor / Agency Report of Income, Deductions, Credits		2018	
Form 1041	For calendar year 2018, or tax year beginning	, and ending	2010	
ame of trust	, , , , , , , , , , , , , , , , , , , ,	· •	X Amended	
_				
Sam Walton			Final	
	number ▶ 400-00-5103	Trust's EIN ▶ 56-9999999		
rantor's name, addres	s, and ZIP code	Fiduciary's name, address, and ZIP code		
		June Bug		
Maggie Walton	ı	Title		
9901 Lovejoy		1180 Dutch Fork Road		
Byron	MI 48418	Ballentine AR 47002		
	Enter the following items on the federal in	ncome tax return of the above named individual.		
Portfolio Income:		Expenses / Deductions:		
Interest	<u></u>	Investment interest		
Includes from U.S	S. obligations	Other interest		
Dividends	·····	Taxes:		
Includes from qua	alified dividends	State / local taxes (including withholding)	1,19	
Includes from U.S	S. obligations	Property taxes paid		
Tax-exempt	·····	Other		
Expenses allocate	ed to tax-exempt income	Foreign tax credit		
Capital Gain / Loss:		Fiduciary fees		
Short-term	<u></u>	Charitable contributions		
	<u></u>	Attorney / accountant fees		
Capital gain distribu	utions	Early withdrawal penalty		
Net section 1231	·····	Other deductions		
Unrecap. sec. 1250	gain (Sch. D Wrk., In. 5)	Medical		
	gain (Sch. D Wrk., In. 11)	Utility		
Section 1202 exclus	sion	Other		
Other Income:		Directly Apportioned Deductions:		
Ordinary gain / loss		Depreciation		
Other	······	Depletion		
From Pass-Through	Entities:	Amortization		
Short-term capital g	ain / loss	Payments:		
Long-term capital ga	ain / ioss	Federal estimated taxes paid		
Net section 1231 ga	ain / loss	Federal tax withheld		
Investment expense	es	Credits:		
Investment income	adjustment	Alternative Minimum Tax Items:		
Section 179 expens	e deduction			
Activities:		Nonpassive	Passive	
Business income / I	088	20,236		
Rental, royalty incor	me / loss	······		
Partnersnip, S corp	income / loss	······		
HOTOTO TRIJETO INCOR	me / loss	······		
Form income / In				
Farm income / loss	nerships			

Grantor 4

Form 1041	Granitor / Agency Ne	eport of income, Deductions, Credits	2018
	For calendar year 2018, or tax year begin	nning , and ending	
ame of trust			X Amended
Sam Walton	Estate		Final
	umber ▶ 400-00-5104	Trust's EIN ▶ 56-9999999	1 1 1101
antor's name, address		Fiduciary's name, address, and ZIP code	
		June Bug	
Ike Walton		Title	
3242 Dexter A	ve	1180 Dutch Fork Road	
Dexter	MI 47108	Ballentine AR 47002	
	Enter the following items on the	federal income tax return of the above named individual.	
Portfolio Income:		Expenses / Deductions:	
Includes from LLS	obligations	Investment interest	
Dividende	obligations	Other interest	
Dividends	ified dividende	Taxes:	1 100
Includes from U.S.	ified dividends	State / local taxes (including withholding)	
	obligations		
Tax-exempt	d to toy exempt income	Other	
	d to tax-exempt income		
Capital Gain / Loss:		Fiduciary fees	
Snort-term		Charitable contributions	
Conital poin distribut	·····	Attorney / accountant fees	
Capital gain distribut	ions	Early withdrawal penalty	
Net section 1231	and (Cale D Well la 5)	Other deductions	
Unrecap. sec. 1250 (gain (Sch. D Wrk., In. 5)		
Unrecap. sec. 1250 (gain (Sch. D Wrk., In. 11)	Utility	
Section 1202 exclusi	ion		
Other Income:		Directly Apportioned Deductions:	
		Depreciation	
		Depletion	
From Pass-Through		Amortization	
Short-term capital ga	in / loss		
Long-term capital gai	in / loss	Federal estimated taxes paid	
Net section 1231 gail	n / loss	Federal tax withheld	
Investment expenses	s	Credits:	
Section 179 expense	adjustment	Alternative Minimum Tax Items:	
Activities:		Nonpassive	Passive
Business income / lo	oss	<u>20,236</u>	
Rental, royalty incom	ne / loss	·····	
Partnership, S corp in	ncome / loss	·····	
Estates, trusts incom	ne / loss	·····	
Farm income / loss			
Publicly traded partn	nerships	<u></u>	
REMIC Schedule Q	income	······	
Gross farming / fishir	ng income		

Form 1041		South Carolina Financial	2018	
		For calendar year 2018, or tax year beginning	, and ending	
Name			Employ	yer Identification Number
SAM	WALTON	ESTATE	56-9	9999999

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)	X
Direct Deposit of Refund	
Routing Transit Number	041000124
Bank Account Number	554123691
Type of Account	SAVINGS
Taxpayer Phone Number	
Requested Payment Date	04/15/19
Amount of Tax Payment	970
Refund to be Deposited	

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

Form **SC1041**

Total deductions Net income

Net income (Force)

SC Allocation of Expenses by Income Type

2018

For calendar year 2018, or tax year beginning

and ending

Name Taxpayer Identification Number 56-9999999 SAM WALTON ESTATE **Dividends** Other Interest Total income Interest Taxes Fiduciary fees Charitable deduction Attorney and accountant fees Other deductions Misc. deductions subject to 2% Total deductions Net income before loss reclassification Reclassified losses Net income Net income (Force) **Business** Rental Real Estate Other Rental 80,944 Total income Interest Taxes Fiduciary fees Charitable deduction Attorney and accountant fees Other deductions Misc. deductions subject to 2% Total deductions Net income before loss reclassification 80,944 Reclassified losses 80,944 Net income Net income (Force) **Short-Term Gains** Long-Term Gains Total income Interest Taxes Fiduciary fees Charitable deduction Attorney and accountant fees Other deductions Misc. deductions subject to 2%

	_	^ 4	_	4	_
Form		(.7	()	4	7

Net income (Force)

SC Allocation of Expenses by Business Type

and ending

2018

For calendar year 2018, or tax year beginning Name Taxpayer Identification Number 56-9999999 SAM WALTON ESTATE **Business** Partnership / S Corp Estate / Trust Total income 80,944 Interest Taxes Fiduciary fees Charitable deduction Attorney and accountant fees Other deductions Misc. deductions subject to 2% Total deductions Net income before loss reclassification 80,944 Reclassified losses Net income Net income (Force) Farm Summary 80,944 Total income Interest Taxes Fiduciary fees Charitable deduction _____ Attorney and accountant fees Other deductions Misc. deductions subject to 2% Total deductions Net income before loss reclassification 80,944 Reclassified losses 80,944 Net income