

Exempt Organization Business Income Tax Return
(and proxy tax under section 6033(e))

For calendar year 2017 or other tax year beginning 07/01, 2017, and ending 06/30, 2018

2017

Department of the Treasury
Internal Revenue Service

Go to www.irs.gov/Form990T for instructions and the latest information.

Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

Open to Public Inspection for 501(c)(3) Organizations Only

| | | |
|---|---|--|
| <input type="checkbox"/> Check box if address changed | Name of organization (<input type="checkbox"/> Check box if name changed and see instructions.) | D Employer identification number (Employees' trust, see instructions.) |
| | FIDELITY INVESTMENTS CHARITABLE GIFT FUND | 11-0303001 |
| B Exempt under section | Number, street, and room or suite no. If a P.O. box, see instructions. | E Unrelated business activity codes (See instructions.) |
| <input checked="" type="checkbox"/> 501(c)(3) | 200 SEAPORT BOULEVARD, MAIL ZONE NCW4B | 525990 |
| <input type="checkbox"/> 408(e) <input type="checkbox"/> 220(e) | City or town, state or province, country, and ZIP or foreign postal code | |
| <input type="checkbox"/> 408A <input type="checkbox"/> 530(a) | BOSTON, MA 02210 | |
| <input type="checkbox"/> 529(a) | | |
| C Book value of all assets at end of year | F Group exemption number (See instructions.) | |
| 26942973355 | | |
| | G Check organization type | |
| | <input type="checkbox"/> 501(c) corporation <input checked="" type="checkbox"/> 501(c) trust <input type="checkbox"/> 401(a) trust <input type="checkbox"/> Other trust | |

H Describe the organization's primary unrelated business activity. **OTHER INVESTMENTS**

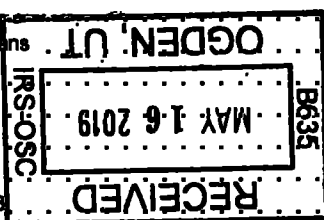
I During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? Yes No
If "Yes," enter the name and identifying number of the parent corporation.

J The books are in care of **DAVID SCOGLIO** Telephone number **617-563-7997**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|---|--|------------|--------------------|-------------|
| 1a | Gross receipts or sales | | | |
| b | Less returns and allowances | | | |
| | c Balance | 1c | | |
| 2 | Cost of goods sold (Schedule A, line 7) | 2 | | |
| 3 | Gross profit. Subtract line 2 from line 1c | 3 | | |
| 4a | Capital gain net income (attach Schedule D) | 4a | 19,318,768. | 19,318,768. |
| b | Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797) | 4b | | |
| c | Capital loss deduction for trusts | 4c | | |
| 5 | Income (loss) from partnerships and S corporations (attach statement) | 5 | 4,574,851. ATCH. 1 | 4,574,851. |
| 6 | Rent income (Schedule C) | 6 | | |
| 7 | Unrelated debt-financed income (Schedule E) | 7 | | |
| 8 | Interest, annuities, royalties, and rents from controlled organizations (Schedule F) | 8 | | |
| 9 | Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G) | 9 | | |
| 10 | Exploited exempt activity income (Schedule I) | 10 | | |
| 11 | Advertising income (Schedule J) | 11 | | |
| 12 | Other income (See instructions; attach schedule) | 12 | | |
| 13 | Total. Combine lines 3 through 12 | 13 | 23,893,619. | 23,893,619. |

Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions.) (Except for contributions, deductions must be directly connected with the unrelated business income.)

| | | | |
|----|--|-----|-------------|
| 14 | Compensation of officers, directors, and trustees (Schedule K) | 14 | |
| 15 | Salaries and wages | 15 | |
| 16 | Repairs and maintenance | 16 | |
| 17 | Bad debts | 17 | |
| 18 | Interest (attach schedule) ATCH. 2 | 18 | 10,199. |
| 19 | Taxes and licenses | 19 | 360,976. |
| 20 | Charitable contributions (See instructions for limitation rules) | 20 | 11,753,142. |
| 21 | Depreciation (attach Form 4562) | 21 | |
| 22 | Less depreciation claimed on Schedule A and elsewhere on return | 22a | |
| 23 | Depletion | 23 | |
| 24 | Contributions to deferred compensation plans | 24 | |
| 25 | Employee benefit programs | 25 | |
| 26 | Excess exempt expenses (Schedule I) | 26 | |
| 27 | Excess readership costs (Schedule J) | 27 | |
| 28 | Other deductions (attach schedule) ATCH. 3 | 28 | 16,160. |
| 29 | Total deductions. Add lines 14 through 28 | 29 | 12,140,477. |
| 30 | Unrelated business taxable income before net operating loss deduction. Subtract line 29 from line 13 | 30 | 11,753,142. |
| 31 | Net operating loss deduction (limited to the amount on line 30) | 31 | |
| 32 | Unrelated business taxable income before specific deduction. Subtract line 31 from line 30 | 32 | 11,753,142. |
| 33 | Specific deduction (Generally \$1,000, but see line 33 instructions for exceptions) | 33 | 1,000. |
| 34 | Unrelated business taxable income. Subtract line 33 from line 32. If line 33 is greater than line 32, enter the smaller of zero or line 32 | 34 | 11,752,142. |



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Part III Tax Computation

35 Organizations Taxable as Corporations. See instructions for tax computation. Controlled group members (sections 1561 and 1563) check here See instructions and.

a Enter your share of the \$50,000, \$25,000, and \$9,925,000 taxable income brackets (in that order):
 (1) \$ _____ (2) \$ _____ (3) \$ _____

b Enter organization's share of: (1) Additional 5% tax (not more than \$11,750) \$ _____
 (2) Additional 3% tax (not more than \$100,000) \$ _____

c Income tax on the amount on line 34. **35c**

36 Trusts Taxable at Trust Rates. See instructions for tax computation. Income tax on the amount on line 34 from: Tax rate schedule or Schedule D (Form 1041). **36** 2,349,421.

37 Proxy tax. See instructions **37**

38 Alternative minimum tax **38** 81,692.

39 Tax on Non-Compliant Facility Income. See instructions **39**

40 Total. Add lines 37, 38 and 39 to line 35c or 36, whichever applies. **40** 2,431,113.

Part IV Tax and Payments

41 a Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116). **41a**

b Other credits (see instructions). **41b**

c General business credit. Attach Form 3800 (see instructions). **41c** 5,355.

d Credit for prior year minimum tax (attach Form 8801 or 8827). **41d**

e Total credits. Add lines 41a through 41d **41e** 5,355.

42 Subtract line 41e from line 40. **42** 2,425,758.

43 Other taxes. Check if from Form 4255 Form 8611 Form 8697 Form 8868 Other (attach schedule). **43**

44 Total tax. Add lines 42 and 43. **44** 2,425,758.

45 a Payments. A 2016 overpayment credited to 2017 **45a** 2,244,081.

b 2017 estimated tax payments **45b** 12,500,000.

c Tax deposited with Form 8868. **45c**

d Foreign organizations: Tax paid or withheld at source (see instructions) **45d**

e Backup withholding (see instructions) **45e**

f Credit for small employer health insurance premiums (Attach Form 8941) **45f**

g Other credits and payments Form 2439 Form 4136 Other _____ Total **45g**

46 Total payments. Add lines 45a through 45g **46** 14,744,081.

47 Estimated tax penalty (see instructions) Check if Form 2220 is attached. **47**

48 Tax due. If line 46 is less than the total of lines 44 and 47, enter amount owed **48**

49 Overpayment. If line 46 is larger than the total of lines 44 and 47, enter amount overpaid **49** 12,318,323.

50 Enter the amount of line 49 you want: Credited to 2018 estimated tax 12,318,323. Refunded **50**

Part V Statements Regarding Certain Activities and Other Information (see instructions)

51 At any time during the 2017 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If YES, the organization may have to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If YES, enter the name of the foreign country here X

52 During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? X
 If YES, see instructions for other forms the organization may have to file

53 Enter the amount of tax-exempt interest received or accrued during the tax year \$

Under the penalties of perjury, I declare that I prepared this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here *Gwen Spencer* 15/6/19 BOARD CHAIR May the IRS discuss this return with the preparer shown below (see instructions)? Yes No

Signature of officer Date Title

Paid Preparer Use Only

Print/Type preparer's name: GWEN SPENCER
 Preparer's signature: *Gwen Spencer*
 Date: 05/06/2019
 Check if self-employed PTIN: P00641463
 Firm's name: PRICEWATERHOUSECOOPERS LLP
 Firm's EIN: 13-4008324
 Firm's address: 101 SEAPORT BOULEVARD, BOSTON, MA 02210
 Phone no.: 617-530-5000

Schedule A - Cost of Goods Sold. Enter method of inventory valuation ▶

| | | | | |
|---|-----------|--|----------|----------------------|
| 1 Inventory at beginning of year | 1 | 6 Inventory at end of year | 6 | |
| 2 Purchases | 2 | 7 Cost of goods sold. Subtract line | | |
| 3 Cost of labor | 3 | 6 from line 5 Enter here and in | | |
| 4a Additional section 263A costs | | Part I, line 2. | 7 | |
| (attach schedule) | 4a | | | |
| b Other costs (attach schedule) | 4b | 8 Do the rules of section 263A (with respect to | | Yes No |
| 5 Total. Add lines 1 through 4b | 5 | property produced or acquired for resale) apply | | |
| | | to the organization? | | |

Schedule C - Rent Income (From Real Property and Personal Property Leased With Real Property)

(see instructions)

1. Description of property

| |
|-----|
| (1) |
| (2) |
| (3) |
| (4) |

2. Rent received or accrued

| (a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%) | (b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income) | 3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule) |
|---|---|---|
| (1) | | |
| (2) | | |
| (3) | | |
| (4) | | |
| Total | Total | |

(c) Total income. Add totals of columns 2(a) and 2(b) Enter here and on page 1, Part I, line 6, column (A) ▶

(b) Total deductions. Enter here and on page 1, Part I, line 6, column (B) ▶

Schedule E - Unrelated Debt-Financed Income (see instructions)

| 1. Description of debt-financed property | 2. Gross income from or allocable to debt-financed property | 3. Deductions directly connected with or allocable to debt-financed property | | |
|---|---|--|--|---|
| | | (a) Straight line depreciation (attach schedule) | (b) Other deductions (attach schedule) | |
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| 4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule) | 5. Average adjusted basis of or allocable to debt-financed property (attach schedule) | 6. Column 4 divided by column 5 | 7. Gross income reportable (column 2 x column 6) | 8. Allocable deductions (column 6 x total of columns 3(a) and 3(b)) |
| (1) | | % | | |
| (2) | | % | | |
| (3) | | % | | |
| (4) | | % | | |
| | | | Enter here and on page 1, Part I, line 7, column (A) | Enter here and on page 1, Part I, line 7, column (B) |
| Totals ▶ | | | | |
| Total dividends-received deductions included in column 8 ▶ | | | | |

Schedule F - Interest, Annuities, Royalties, and Rents From Controlled Organizations (see instructions)

Table with 6 columns: 1. Name of controlled organization, 2. Employer identification number, 3. Net unrelated income (loss), 4. Total of specified payments made, 5. Part of column 4 that is included in the controlling organization's gross income, 6. Deductions directly connected with income in column 5.

Nonexempt Controlled Organizations

Table with 5 columns: 7. Taxable Income, 8. Net unrelated income (loss), 9. Total of specified payments made, 10. Part of column 9 that is included in the controlling organization's gross income, 11. Deductions directly connected with income in column 10.

Schedule G - Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

Table with 5 columns: 1. Description of income, 2. Amount of income, 3. Deductions directly connected (attach schedule), 4. Set-asides (attach schedule), 5. Total deductions and set-asides (col 3 plus col 4).

Schedule I - Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

Table with 7 columns: 1. Description of exploited activity, 2. Gross unrelated business income from trade or business, 3. Expenses directly connected with production of unrelated business income, 4. Net income (loss) from unrelated trade or business, 5. Gross income from activity that is not unrelated business income, 6. Expenses attributable to column 5, 7. Excess exempt expenses (column 6 minus column 5, but not more than column 4).

Schedule J - Advertising Income (see instructions)

Part I Income From Periodicals Reported on a Consolidated Basis

Table with 7 columns: 1. Name of periodical, 2. Gross advertising income, 3. Direct advertising costs, 4. Advertising gain or (loss) (col 2 minus col 3) If a gain, compute cols 5 through 7, 5. Circulation income, 6. Readership costs, 7. Excess readership costs (column 6 minus column 5, but not more than column 4).

Part II Income From Periodicals Reported on a Separate Basis (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis)

| 1. Name of periodical | 2. Gross advertising income | 3. Direct advertising costs | 4. Advertising gain or (loss) (col 2 minus col 3) If a gain, compute cols 5 through 7 | 5. Circulation income | 6. Readership costs | 7. Excess readership costs (column 6 minus column 5, but not more than column 4) |
|--|--|--|---|-----------------------|---------------------|--|
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Totals from Part I. ▶ | | | | | | |
| | Enter here and on page 1, Part I, line 11, col (A) | Enter here and on page 1, Part I, line 11, col (B) | | | | Enter here and on page 1, Part II, line 27 |
| Totals, Part II (lines 1-5) ▶ | | | | | | |

Schedule K - Compensation of Officers, Directors, and Trustees (see instructions)

| 1. Name | 2. Title | 3. Percent of time devoted to business | 4. Compensation attributable to unrelated business |
|--|----------|--|--|
| (1) | | % | |
| (2) | | % | |
| (3) | | % | |
| (4) | | % | |
| Total. Enter here and on page 1, Part II, line 14 ▶ | | | |

**SCHEDULE I
(Form 1041)**

Alternative Minimum Tax - Estates and Trusts

OMB No 1545-0092

2017

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1041.
▶ Go to www.irs.gov/Form1041 for instructions and the latest information.

Name of estate or trust: **FIDELITY INVESTMENTS CHARITABLE GIFT FUND**
Employer identification number: **11-0303001**

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

| | | |
|---|---|-------------|
| 1 | Adjusted total income or (loss) (from Form 1041, line 17) | 11,753,142. |
| 2 | Interest | |
| 3 | Taxes | 360,976. |
| 4 | Miscellaneous itemized deductions (from Form 1041, line 15c) | |
| 5 | Refund of taxes | () |
| 6 | Depletion (difference between regular tax and AMT) | |
| 7 | Net operating loss deduction Enter as a positive amount | |
| 8 | Interest from specified private activity bonds exempt from the regular tax. | |
| 9 | Qualified small business stock (see instructions) | |
| 10 | Exercise of incentive stock options (excess of AMT income over regular tax income) | |
| 11 | Other estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A) | |
| 12 | Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6) | |
| 13 | Disposition of property (difference between AMT and regular tax gain or loss) | |
| 14 | Depreciation on assets placed in service after 1986 (difference between regular tax and AMT) | |
| 15 | Passive activities (difference between AMT and regular tax income or loss) ATCH 4 | 22,964. |
| 16 | Loss limitations (difference between AMT and regular tax income or loss) | |
| 17 | Circulation costs (difference between regular tax and AMT) | |
| 18 | Long-term contracts (difference between AMT and regular tax income) | |
| 19 | Mining costs (difference between regular tax and AMT) | |
| 20 | Research and experimental costs (difference between regular tax and AMT) | |
| 21 | Income from certain installment sales before January 1, 1987 | () |
| 22 | Intangible drilling costs preference | 23,381. |
| 23 | Other adjustments, including income-based related adjustments | 137. |
| 24 | Alternative tax net operating loss deduction (See the instructions for the limitation that applies) | () |
| 25 | Adjusted alternative minimum taxable income Combine lines 1 through 24 | 12,160,600. |
| Note: Complete Part II below before going to line 26 | | |
| 26 | Income distribution deduction from Part II, line 44 | |
| 27 | Estate tax deduction (from Form 1041, line 19) | |
| 28 | Add lines 26 and 27 | |
| 29 | Estate's or trust's share of alternative minimum taxable income Subtract line 28 from line 25. | 12,160,600. |

If line 29 is

- \$24,100 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 \$24,100, but less than \$176,850, go to line 45
- \$176,850 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) | 12,160,600. |
| 31 | Adjusted tax-exempt interest (other than amounts included on line 8) | |
| 32 | Total net gain from Schedule D (Form 1041), line 19, column (1) If a loss, enter -0- | |
| 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) | |
| 34 | Capital gains paid or permanently set aside for charitable purposes from gross income (see instructions) | |
| 35 | Capital gains computed on a minimum tax basis included on line 25 | (19318768.) |
| 36 | Capital losses computed on a minimum tax basis included on line 25 Enter as a positive amount | |
| 37 | Distributable net alternative minimum taxable income (DNAMTI) Combine lines 30 through 36 If zero or less, enter -0- | |
| 38 | Income required to be distributed currently (from Form 1041, Schedule B, line 9) | |
| 39 | Other amounts paid, credited, or otherwise required to be distributed (from Form 1041, Schedule B, line 10) | |
| 40 | Total distributions Add lines 38 and 39 | |
| 41 | Tax-exempt income included on line 40 (other than amounts included on line 8) | |
| 42 | Tentative income distribution deduction on a minimum tax basis Subtract line 41 from line 40 | |

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

Schedule I (Form 1041) (2017)

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

| | | | |
|----|---|----|--|
| 43 | Tentative income distribution deduction on a minimum tax basis Subtract line 31 from line 37 If zero or less, enter -0- | 43 | |
| 44 | Income distribution deduction on a minimum tax basis. Enter the smaller of line 42 or line 43 Enter here and on line 26. | 44 | |

Part III Alternative Minimum Tax

| | | | |
|----|--|----|-------------|
| 45 | Exemption amount | 45 | \$24,100 00 |
| 46 | Enter the amount from line 29 | 46 | |
| 47 | Phase-out of exemption amount | 47 | \$80,450 00 |
| 48 | Subtract line 47 from line 46 If zero or less, enter -0- | 48 | |
| 49 | Multiply line 48 by 25% (0 25) | 49 | |
| 50 | Subtract line 49 from line 45 If zero or less, enter -0- | 50 | |
| 51 | Subtract line 50 from line 46 | 51 | 12,160,600. |
| 52 | 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 - • \$187,800 or less, multiply line 51 by 26% (0 26) • Over \$187,800, multiply line 51 by 28% (0 28) and subtract \$3,756 from the result | 52 | 2,431,113. |
| 53 | Alternative minimum foreign tax credit (see instructions) | 53 | |
| 54 | Tentative minimum tax Subtract line 53 from line 52 | 54 | 2,431,113. |
| 55 | Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Schedule G, line 2a) | 55 | 2,349,421. |
| 56 | Alternative minimum tax. Subtract line 55 from line 54 If zero or less, enter -0- Enter here and on Form 1041, Schedule G, line 1c | 56 | 81,692. |

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

| | | | |
|----|--|----|-------------|
| 57 | Enter the amount from line 51 | 57 | 12,160,600. |
| 58 | 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) | 58 | 19,040,716. |
| 59 | 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- | 59 | 37,486. |
| 60 | 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 smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary) | 60 | 19,078,202. |
| 61 | Enter the smaller of line 57 or line 60 | 61 | 12,160,600. |
| 62 | Subtract line 61 from line 57 | 62 | |
| 63 | If line 62 is \$187,800 or less, multiply line 62 by 26% (0 26) Otherwise, multiply line 62 by 28% (0 28) and subtract \$3,756 from the result | 63 | |
| 64 | Maximum amount subject to the 0% rate | 64 | \$2,550 00 |
| 65 | 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- | 65 | |
| 66 | Subtract line 65 from line 64 If zero or less, enter -0- | 66 | 2,550. |
| 67 | Enter the smaller of line 57 or line 58 | 67 | 12,160,600. |
| 68 | Enter the smaller of line 66 or line 67 This amount is taxed at 0% | 68 | 2,550. |
| 69 | Subtract line 68 from line 67 | 69 | 12,158,050. |

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

| | | | | | |
|----|--|----|-------------|------------|--|
| 70 | Maximum amount subject to rates below 20% | 70 | \$12,500.00 | | |
| 71 | Enter the amount from line 66 | 71 | 2,550. | | |
| 72 | 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- | 72 | | | |
| 73 | Add line 71 and line 72 | 73 | 2,550. | | |
| 74 | Subtract line 73 from line 70. If zero or less, enter -0- | 74 | 9,950. | | |
| 75 | Enter the smaller of line 69 or 74 | 75 | 9,950. | | |
| 76 | Multiply line 75 by 15% (0.15) | 76 | | 1,493. | |
| 77 | Add lines 68 and 75 If lines 77 and 57 are the same, skip lines 78 through 82 and go to line 83. Otherwise, go to line 78. | 77 | 12,500. | | |
| 78 | Subtract line 77 from line 67 | 78 | 12,148,100. | | |
| 79 | Multiply line 78 by 20% (0.20) If line 59 is zero or blank, skip lines 80 through 82 and go to line 83. Otherwise, go to line 80. | 79 | | 2,429,620. | |
| 80 | Add lines 62, 77, and 78 | 80 | 12,160,600. | | |
| 81 | Subtract line 80 from line 57 | 81 | | | |
| 82 | Multiply line 81 by 25% (0.25) | 82 | | | |
| 83 | Add lines 63, 76, 79, and 82 | 83 | | 2,431,113. | |
| 84 | If line 57 is \$187,800 or less, multiply line 57 by 26% (0.26). Otherwise, multiply line 57 by 28% (0.28) and subtract \$3,756 from the result | 84 | | 3,401,212. | |
| 85 | Enter the smaller of line 83 or line 84 here and on line 52 | 85 | | 2,431,113. | |

Schedule I (Form 1041) (2017)

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No 1545-0092

2017

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1041, Form 5227, or Form 990-T.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.
▶ Go to www.irs.gov/F1041 for instructions and the latest information.

Name of estate or trust: **FIDELITY INVESTMENTS CHARITABLE GIFT FUND**
Employer identification number: **11-0303001**

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

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

| 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) |
|--|----------------------------------|---------------------------------|---|---|
| 1a 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. | | | | |
| 1b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | 131,551. | | | 131,551. |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 -4,322. |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 5 122,202. |
| 6 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2016 Capital Loss Carryover Worksheet. | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h) Enter here and on line 17, column (3) on the back ▶ | | | | 7 249,431. |

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

| 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) |
|---|----------------------------------|---------------------------------|--|---|
| 8a 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. | | | | |
| 8b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | 17585164. | 1,743,375. | | 15841789. |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 -6,484. |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts. | | | | 12 2,795,909. |
| 13 Capital gain distributions. | | | | 13 |
| 14 Gain from Form 4797, Part I. | | | | 14 438,123. |
| 15 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2016 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h) Enter here and on line 18a, column (3) on the back ▶ | | | | 16 19,069,337. |

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

Schedule D (Form 1041) 2017

JSA
7F1210 2 000

Part III Summary of Parts I and II

Caution: Read the instructions before completing this part

Table with 4 columns: Line number, Description, (1) Beneficiaries' (see instr), (2) Estate's or trust's, (3) Total. Rows include Net short-term gain or (loss), Net long-term gain or (loss) (Total for year, Unrecaptured section 1250 gain, 28% rate gain), and Total net gain or (loss).

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

Part IV Capital Loss Limitation

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 smaller 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 34), 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 34, 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

Table with 4 columns: Line number, Description, (1) Beneficiaries' (see instr), (2) Estate's or trust's, (3) Total. Rows include taxable income from Form 1041, line 22 (or Form 990-T, line 34), and various calculations for capital gains tax (lines 21-45).

Name(s) shown on return Name and SSN or taxpayer identification no not required if shown on other side

Social security number or taxpayer identification number

FIDELITY INVESTMENTS CHARITABLE GIFT FUND

11-0303001

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check

Part II Long-Term. Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a, you aren't required to report these transactions on Form 8949 (see instructions)

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need

- (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
- (F) Long-term transactions not reported to you on Form 1099-B

| 1 | (a) Description of property (Example 100 sh XYZ Co) | (b) Date acquired (Mo, day, yr) | (c) Date sold or disposed (Mo, day, yr) | (d) Proceeds (sales price) (see instructions) | (e) Cost or other basis See the Note below and see Column (e) in the separate instructions | Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f) See the separate instructions. | | (h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g) |
|-----------------|--|---------------------------------------|---|--|---|---|--------------------------------|---|
| | | | | | | (f) Code(s) from instructions | (g) Amount of adjustment | |
| | SALE OF PTP INVESTMENT S | VARIOUS | VARIOUS | 4,821,324. | | | | 4,821,324. |
| | FREIGHT HANDLERS LLC | VARIOUS | VARIOUS | 538,763. | | | | 538,763. |
| | BV INTERNATIONAL HOLDINGS, INC | VARIOUS | VARIOUS | 509,654. | | | | 509,654. |
| | ROYAL STREET CORPORATION | VARIOUS | VARIOUS | 6,982. | | | | 6,982. |
| | ESTUDILLO HOLDINGS | VARIOUS | VARIOUS | 2,778,250. | | | | 2,778,250. |
| | SOUTHERN INDIANA TIRE, INC | VARIOUS | VARIOUS | 2,011,044. | 1000000. | | | 1,011,044. |
| | THE JACMAR COMPANIES | VARIOUS | VARIOUS | 1,839,686. | 170,000. | | | 1,669,686. |
| | THE JACMAR COMPANIES | VARIOUS | VARIOUS | 25,212. | | | | 25,212. |
| | THE JACMAR COMPANIES | VARIOUS | VARIOUS | 933,787. | 156,000. | | | 777,787. |
| | THE JACMAR COMPANIES | VARIOUS | VARIOUS | 101,783. | | | | 101,783. |
| | MURRAY AND STAFFORD, INC | VARIOUS | VARIOUS | 1,300,000. | 417,375. | | | 882,625. |
| | TRUEPOINT, INC | VARIOUS | VARIOUS | 170,665. | | | | 170,665. |
| | PMBS HOLDCO, LLC | VARIOUS | VARIOUS | 1,456,008. | | | | 1,456,008. |
| | PMBS HOLDCO, LLC | VARIOUS | VARIOUS | 1,092,006. | | | | 1,092,006. |
| 2 Totals | Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)▶ | | | 17585164. | 1743375. | | | 15,841,789. |

Note: If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment

FORM 990T - LINE 5 -INCOME (LOSS) FROM PARTNERSHIPS AND S CORPORATIONS

| PARTNERSHIP NAME | EIN | INCOME FROM SCH. E | INTEREST | DIVIDENDS | OTHER INCOME |
|-------------------------|-----|-----------------------|----------------|----------------|--------------|
| PARTNERSHIP INVESTMENTS | | 786,242. | 13,301. | 11,839. | |
| PTP RELEASED LOSSES | | -351. | | | |
| MLP INVESTMENTS | | 3,763,820. | | | |
| | | <u>4,549,711.</u> | <u>13,301.</u> | <u>11,839.</u> | |
| TOTAL | | | | | |

INCOME (LOSS) ON LINE 5

4,574,851.

FORM 990T - PART II - LINE 18: INVESTMENT INTEREST

INVESTMENT INTEREST EXPENSE DEDUCTION (FORM 4952, LINE 8) 10,199.

FORM 990T - PART II - LINE 18: NON-INVESTMENT INTEREST

10,199.

FORM 990T - TOTAL OTHER DEDUCTIONS

| | |
|--|-----------------------|
| PARTNERSHIP INVESTMENTS | 1,160. |
| OTHER DEDUCTIONS NOT SUBJECT TO 2% LIMITATION FROM K-1 | <u>1,160.</u> |
| PROFESSIONAL FEES | 15,000. |
| OTHER DEDUCTIONS FROM NON K-1 | <u>15,000.</u> |
| | |
| TOTAL: LINE 28 - OTHER DEDUCTIONS | <u><u>16,160.</u></u> |

Department of the Treasury
Internal Revenue Service (99)

▶ Go to www.irs.gov/Form3800 for instructions and the latest information.
▶ You must attach all pages of Form 3800, pages 1, 2, and 3, to your tax return.

2017
Attachment
Sequence No **22**

Name(s) shown on return

Identifying number

FIDELITY INVESTMENTS CHARITABLE GIFT FUND

11-0303001

Part I Current Year Credit for Credits Not Allowed Against Tentative Minimum Tax (TMT)

(See instructions and complete Part(s) III before Parts I and II)

| | | | | |
|---|--|---|-----|-----|
| 1 | General business credit from line 2 of all Parts III with box A checked | | 1 | |
| 2 | Passive activity credits from line 2 of all Parts III with box B checked | 2 | 863 | |
| 3 | Enter the applicable passive activity credits allowed for 2017 See instructions | | 3 | 863 |
| 4 | Carryforward of general business credit to 2017 Enter the amount from line 2 of Part III with box C checked See instructions for statement to attach | | 4 | |
| 5 | Carryback of general business credit from 2018 Enter the amount from line 2 of Part III with box D checked See instructions | | 5 | |
| 6 | Add lines 1, 3, 4, and 5 | | 6 | 863 |

Part II Allowable Credit

| | | | | |
|-----|--|-----|-----------|-----------|
| 7 | Regular tax before credits • Individuals Enter the sum of the amounts from Form 1040, lines 44 and 46, or the sum of the amounts from Form 1040NR, lines 42 and 44 • Corporations Enter the amount from Form 1120, Schedule J, Part I, line 2, or the applicable line of your return • Estates and trusts Enter the sum of the amounts from Form 1041, Schedule G, lines 1a and 1b, or the amount from the applicable line of your return | | 7 | 2,349,421 |
| 8 | Alternative minimum tax • Individuals Enter the amount from Form 6251, line 35 • Corporations Enter the amount from Form 4626, line 14 • Estates and trusts Enter the amount from Schedule I (Form 1041), line 56 | | 8 | 81,692 |
| 9 | Add lines 7 and 8 | | 9 | 2,431,113 |
| 10a | Foreign tax credit | 10a | | |
| b | Certain allowable credits (see instructions) | 10b | | |
| c | Add lines 10a and 10b | | 10c | 0 |
| 11 | Net income tax. Subtract line 10c from line 9 If zero, skip lines 12 through 15 and enter -0- on line 16 | | 11 | 2,431,113 |
| 12 | Net regular tax. Subtract line 10c from line 7 If zero or less, enter -0- | 12 | 2,349,421 | |
| 13 | Enter 25% (0.25) of the excess, if any, of line 12 over \$25,000 (see instructions) | 13 | 581,105 | |
| 14 | Tentative minimum tax • Individuals Enter the amount from Form 6251, line 33 • Corporations Enter the amount from Form 4626, line 12 • Estates and trusts Enter the amount from Schedule I (Form 1041), line 54 | 14 | 2,431,113 | |
| 15 | Enter the greater of line 13 or line 14 | | 15 | 2,431,113 |
| 16 | Subtract line 15 from line 11 If zero or less, enter -0- | | 16 | 0 |
| 17 | Enter the smaller of line 6 or line 16 C corporations: See the line 17 instructions if there has been an ownership change, acquisition, or reorganization | | 17 | |

For Paperwork Reduction Act Notice, see separate instructions.

Part II Allowable Credit (Continued)

Note: If you are not required to report any amounts on lines 22 or 24 below, skip lines 18 through 25 and enter -0- on line 26

| | | | |
|----|--|----|-----------|
| 18 | Multiply line 14 by 75% (0.75). See instructions | 18 | 1,823,335 |
| 19 | Enter the greater of line 13 or line 18 | 19 | 1,823,335 |
| 20 | Subtract line 19 from line 11. If zero or less, enter -0- | 20 | 607,778 |
| 21 | Subtract line 17 from line 20. If zero or less, enter -0- | 21 | 607,778 |
| 22 | Combine the amounts from line 3 of all Parts III with box A, C, or D checked | 22 | |
| 23 | Passive activity credit from line 3 of all Parts III with box B checked | 23 | |
| 24 | Enter the applicable passive activity credit allowed for 2017. See instructions | 24 | |
| 25 | Add lines 22 and 24 | 25 | 0 |
| 26 | Empowerment zone and renewal community employment credit allowed. Enter the smaller of line 21 or line 25 | 26 | 0 |
| 27 | Subtract line 13 from line 11. If zero or less, enter -0- | 27 | 1,850,008 |
| 28 | Add lines 17 and 26 | 28 | 0 |
| 29 | Subtract line 28 from line 27. If zero or less, enter -0- | 29 | 1,850,008 |
| 30 | Enter the general business credit from line 5 of all Parts III with box A checked | 30 | |
| 31 | Reserved | 31 | |
| 32 | Passive activity credits from line 5 of all Parts III with box B checked | 32 | 5,355 |
| 33 | Enter the applicable passive activity credits allowed for 2017. See instructions | 33 | 5,355 |
| 34 | Carryforward of business credit to 2017. Enter the amount from line 5 of Part III with box C checked and line 6 of Part III with box G checked. See instructions for statement to attach | 34 | |
| 35 | Carryback of business credit from 2018. Enter the amount from line 5 of Part III with box D checked. See instructions | 35 | |
| 36 | Add lines 30, 33, 34, and 35 | 36 | 5,355 |
| 37 | Enter the smaller of line 29 or line 36 | 37 | 5,355 |
| 38 | <p>Credit allowed for the current year. Add lines 28 and 37</p> <p>Report the amount from line 38 (if smaller than the sum of Part I, line 6, and Part II, lines 25 and 36, see instructions) as indicated below or on the applicable line of your return</p> <ul style="list-style-type: none"> • Individuals Form 1040, line 54, or Form 1040NR, line 51 • Corporations Form 1120, Schedule J, Part I, line 5c • Estates and trusts Form 1041, Schedule G, line 2b | 38 | 5,355 |

Name(s) shown on return

Identifying number

FIDELITY INVESTMENTS CHARITABLE GIFT FUND

11-0303001

Part III General Business Credits or Eligible Small Business Credits (see instructions)

Complete a separate Part III for each box checked below (see instructions)

- A General Business Credit From a Non-Passive Activity
- B General Business Credit From a Passive Activity
- C General Business Credit Carryforwards
- D General Business Credit Carrybacks
- E Reserved
- F Reserved
- G Eligible Small Business Credit Carryforwards
- H Reserved

I If you are filing more than one Part III with box A or B checked, complete and attach first an additional Part III combining amounts from all Parts III with box A or B checked. Check here if this is the consolidated Part III

| (a) Description of credit | | (b) If claiming the credit from a pass-through entity, enter the EIN | (c) Enter the appropriate amount |
|--|---|--|----------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity | | | |
| 1a | Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b | Reserved | 1b | |
| c | Increasing research activities (Form 6765) | 1c | 98-1196248 93 |
| d | Low-income housing (Form 8586, Part I only) | 1d | |
| e | Disabled access (Form 8826) (see instructions for limitation) | 1e | |
| f | Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g | Indian employment (Form 8845) | 1g | |
| h | Orphan drug (Form 8820) | 1h | |
| i | New markets (Form 8874) | 1i | |
| j | Small employer pension plan startup costs (Form 8881) (see instructions for limitation) | 1j | |
| k | Employer-provided child care facilities and services (Form 8882) (see instructions for limitation) | 1k | |
| l | Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m | Low sulfur diesel fuel production (Form 8896) | 1m | |
| n | Distilled spirits (Form 8906) | 1n | |
| o | Nonconventional source fuel (carryforward only) | 1o | |
| p | Energy efficient home (Form 8908) | 1p | |
| q | Energy efficient appliance (carryforward only) | 1q | |
| r | Alternative motor vehicle (Form 8910) | 1r | |
| s | Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t | Enhanced oil recovery credit (Form 8830) | 1t | |
| u | Mine rescue team training (Form 8923) | 1u | |
| v | Agricultural chemicals security (carryforward only) | 1v | |
| w | Employer differential wage payments (Form 8932) | 1w | |
| x | Carbon dioxide sequestration (Form 8933) | 1x | |
| y | Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z | Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa | Employee retention (Form 5884-A) | 1aa | |
| bb | General credits from an electing large partnership (Schedule K-1 (Form 1065-B)) | 1bb | |
| zz | Other Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 | Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 93 |
| 3 | Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a | Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b | Work opportunity (Form 5884) | 4b | 20-4310816 14 |
| c | Biofuel producer (Form 6478) | 4c | |
| d | Low-income housing (Form 8586, Part II) | 4d | 04-3455023 6 |
| e | Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f | Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g | Qualified railroad track maintenance (Form 8900) | 4g | |
| h | Small employer health insurance premiums (Form 8941) | 4h | 20-4310816 7 |
| i | Increasing research activities (Form 6765) | 4i | 20-4310816 30 |
| j | Reserved | 4j | |
| z | Other | 4z | 98-0500169 3,805 |
| 5 | Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 3,862 |
| 6 | Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 3,955 |

Name(s) shown on return

Identifying number

FIDELITY INVESTMENTS CHARITABLE GIFT FUND

11-0303001

Part III General Business Credits or Eligible Small Business Credits (see instructions)

Complete a separate Part III for each box checked below (see instructions)

- A General Business Credit From a Non-Passive Activity E Reserved
- B General Business Credit From a Passive Activity F Reserved
- C General Business Credit Carryforwards G Eligible Small Business Credit Carryforwards
- D General Business Credit Carrybacks H Reserved

I If you are filing more than one Part III with box A or B checked, complete and attach first an additional Part III combining amounts from all Parts III with box A or B checked. Check here if this is the consolidated Part III ▶

| (a) Description of credit | (b) If claiming the credit from a pass-through entity, enter the EIN | (c) Enter the appropriate amount |
|--|--|----------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826) (see instructions for limitation) | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs (Form 8881) (see instructions for limitation) | 1j | |
| k Employer-provided child care facilities and services (Form 8882) (see instructions for limitation) | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (Form 8830) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon dioxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (Schedule K-1 (Form 1065-B)) | 1bb | |
| zz Other Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 0 |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Reserved | 4j | |
| z Other | 4z | 966 |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 966 |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 966 |