

EXTENDED TO NOVEMBER 15, 2019

Form 990-1		zxempi Orga				ax ne	turn		Olvio IV	1343-0007	
* -5		•	nd proxy tax und	er se	ction 6033(e))				2	<b>040</b>	
à	For ca	lender year 2018 or other tax ye			, and ending			-		UIO	
Department of the Treasury			v.irs.gov/Form990T for in				4(-)(0)	H		ublic Inspection for	
Internal Revenue Service		Do not enter SSN number				ation is a 50	<del></del>			Organizations Only fication number	
A Check box if address changed	]	Name of organization (	Check box if name c	hanged	and see instructions.)			(Emp	loyees' trus	st, see	
	Ì								uctions)		
B Exempt under section	Print	J. N. PEW JR. CH			*				23-629	ess activity code	
X 501(c \\ 03 )	Type	1	n or suite no. If a P.O. box				ľ		instructions		
408(e) 220(e)	',,,		ST CO., N.A. 1650								
408A 530(a)			vince, country, and ZIP of	r foreig	n postal code		l		••		
529(a)		PHILADELPHIA, PA					F	9000	10		
C Book value of all assets at end of year		F Group exemption num		<u> </u>			1			<del>-</del>	
290,004,							401(a)			Other trust	
H Enter the number of the	-			1	<del></del>	the only (or	•				
	trade or business here INVESTMENT IN PARTNERSHIPS . If only one, complete Parts I-V. If more than one,										
		ace at the end of the preyio	us sentence, complete Pa	rts I an	d II, complete a Schedule	M for each	additiona	l trade	or		
business, then complete				<del></del>				<del></del>		<del>-</del>	
	•	poration a subsidiary in an	• , ,	nt-subsi	diary controlled group?	ŭ		Ye	es X	No	
		tifying number of the pare					<u> </u>		2 6226		
J The books are in care of		THE GLENMEDE TRUST			· · · · · · · · · · · · · · · · · · ·	one number		5-41	9-6000		
		de or Business Inc	ome		(A) Income	(B) E	xpenses	) (294 Fa8000	4-5-8000000	(C) Net	
1a Gross receipts or sale									Service.		
<b>b</b> Less returns and allow			<b>c</b> Balance ►	1c		Maria Varia	31738	The same	772	BURNESS TO THE	
2 Cost of goods sold (S		•	$\wedge \wedge \wedge$	_2			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	<b>"</b> 、(2)	350000	RECEIPT OF THE PARTY OF THE PAR	
3 Gross profit. Subtract			N/1/ /	3	115 510		\$ 3.76°	****	<del> </del>	/	
4a Capital gain net incon	•		• • •	4a	/ 115,548.		, ,		<b>├</b> ──	115,548.	
		Part II, line 17) (attach Forr	n 4797)	4b		STATE OF THE STATE	200	^ 4==} ~~~	<del> </del>		
<ul> <li>Capital loss deduction</li> </ul>				4c	110.550	\$\$\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		39%	├──	, , , , , , , , , , , , , , , , , , , ,	
` '	•	ship or an S corporation (a	ttach statement)	5	<119,550.>	31544 <i>11/</i>	ત્યુંકારી જેક	· Ä	<u> </u>	<119,550.>	
6 Rent income (Schedu		•		6					<del> </del>		
7 Unrelated debt-finance	ed inco	me (Schedule E)		7					ļ	,	
•		and rents from a controlled	=	8		ļ			<u> </u>		
		on 501(c)(7), (9), or (17) c	rganization (Schedule G)						<del>                                     </del>		
10 Exploited exempt acti	-	, ,		10	-				<del>                                     </del>		
11 Advertising income (S		•		11	*	177700s1436.1. 44			<del> </del>		
12 Other income (See in:		•		12		A PROPERTY.	2 / B 5	uti i	<del> </del>		
13 Total, Combine lines				13	<4,002.>				<u> </u>	<4,002.>	
Rart II Deductio	ns No	ot Taken Elsewhe	re (See instructions fo	or limita	itions on deductions)	maama \					
<del></del>		utions, deductions mus		with t	ne unrelated business	income )					
	icers, d	rectors, and trustees (Sch	edule K)				١,	14	<del> </del>	<del>-</del>	
15 Salaries and wages					RECEIVE	D	ŀ	15	<del>                                     </del>	<del></del>	
16 Repairs and mainter	ance					ပ္ပ	ŀ	16	├──	<u> </u>	
17 Bad debts				38	NOV 2 1 20	19	}	17	<del>                                     </del>		
18 Interest (attach sche	dule) (s	see instructions)		ြပ်	1 100 2 1 20	် လြ	}	18	<del> </del>		
19 Taxes and licenses				,	- 000- 000-000			19	├──		
		e instructions for limitation	rules) STATEMENT	<b>4</b>	OGDEN,"T	ן דע		20 1400	<del> </del>	0.	
21 Depreciation (attach		•		L	<del>-  </del>	····					
·	aimed o	n Schedule A and elsewhe	re on return		22a			22b	<del>                                     </del>		
23 Depletion							ļ.	23	├──		
24 Contributions to defe							}	24	<del>                                     </del>		
25 Employee benefit pro	-		,			_	j	25			
26 Excess exempt expenses (Schedule I)							}	26	<del>                                     </del>		
								27	<del>                                     </del>		
								28	├	_	
29 Total deductions. Add lines 14 through 28								<del></del>	0.		
		ncome before net operatin					ļ	30	<u>A Marenteeze</u>	<4,002.>	
·	•	loss arising in tax years be	•	ry 1, 20	18 (see instructions)		}	31	742	MARKET (S)	
32 Unrelated business t	taxable i	ncome. Subtract line 31 fr	om line 30					32	L	<4,002.>	

Form **990-T** (2018)

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Form 990-T	(2018) J. N. PEW JR. CHARITA	ABLE TRUST		23-629	9309			Page :
Part I	II Total Unrelated Business	Taxable Income						
33	Total of unrelated business taxable incom-	e computed from all unrelated trades or bu	sinesses (see instructions		33	<	4,00	32.>
34	Amounts paid for disallowed fringes				34			
35	Deduction for net operating loss arising in	tax years beginning before January 1, 201	8 (see instructions)		35			
36	Total of unrelated business taxable income	e before specific deduction. Subtract line 3	5 from the sum of					
	lines 33 and 34				36	<	4,0	
37	Specific deduction (Generally \$1,000, but	see line 37 instructions for exceptions)			37		1,	000.
38	Unrelated business taxable income. Sub	otract line 37 from line 36. If line 37 is grea	ter than line 36,					
	enter the smaller of zero or line 36				38	<	4,0	02.>
Part I	<del>,</del>	·			<del>-, - , -</del>			
39	Organizations Taxable as Corporations.			<b>•</b>	39			
40		ctions for tax computation. Income tax on	the amount on line 38 fror	n:				^
	<del></del>	ule D (Form 1041)			40			0.
41	Proxy tax. See instructions				41			
42	Alternative minimum tax (trusts only)				42			
43	Tax on Noncompliant Facility Income. S				43			
44 Part \	Total. Add lines 41, 42, and 43 to line 39	or 40, whichever applies		•	44			0.
	Foreign tax credit (corporations attach For	rm 1110: trusto attach Form 1116)	45a		$\overline{}$			
	Other credits (see instructions)	iii iiio, tiosis attacii roiiii iiio)	45b		<b>⊣</b> ∣			
0	General business credit. Attach Form 380	n	45c		-			
ن			45d	<del></del>	7			
d	Total credits. Add lines 45a through 45d	101111 000 1 01 0027 )	434		45e			
46	Subtract line 45e from line 44				46			٥.
47	Other taxes. Check if from: Form 42	55 Form 8611 Form 8697	Form 8866 Oth	er (attach schedule)				
48	Total tax. Add lines 46 and 47 (see instru			<u>. (</u> ,	48			٥.
49		965-A or Form 965-B, Part II, column (k), I	ine 2		49			٥.
	Payments: A 2017 overpayment credited		50a	54,065	<del> </del>			
	2018 estimated tax payments		50b	2,000	<b>⊣</b> 1			
	Tax deposited with Form 8868		50c		7			
	Foreign organizations: Tax paid or withhel	d at source (see instructions)	50d		7			
	Backup withholding (see instructions)		50e		7			
f		e premiums (attach Form 8941)	50f		7			
a	Other credits, adjustments, and payments				7			
•	Form 4136	Other	Total ▶ 50g					
51	Total payments. Add lines 50a through 5		· <u></u>		51		56,	065.
52	Estimated tax penalty (see instructions). (	· · · · · · · · · · · · · · · · · · ·			52			
53	Tax due. If line 51 is less than the total of	lines 48, 49, and 52, enter amount owed		<b>&gt;</b>	53			
54	Overpayment. If line 51 is larger than the	total of lines 48, 49, and 52, enter amount	overpaid	<b>&gt;</b>	54		56,	065.
55	Enter the amount of line 54 you want: Cre			Refunded <b>&gt;</b>	55			٥.
Part \	VI Statements Regarding C	ertain Activities and Other In	formation (see inst	ructions)				
56	At any time during the 2018 calendar year	, did the organization have an interest in oi	a signature or other author	ority		دا	⁄es	No
	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 count	ту				
	here 🕨					<u>-</u>		Х
57	During the tax year, did the organization r	eceive a distribution from, or was it the gra	ntor of, or transferor to, a	foreign trust?		L		Х
	If "Yes," see instructions for other forms t	he organization may have to file.						
58_		eceived or accrued during the tax year	·	<u>.</u>				
Ciam	Under penalties of perjury, I declare that I have correct, and complete. Declaration of prepare	e examined this return, including accompanying sch r (other than taxpayer) is based on all information of	nedules and statements, and to which preparer has any knowle	the best of my knowl dge	ledge and belief	, it is true,	•	
Sign Here	1000	Industra x and		Г	May the IRS disc	cuss this re	turn w	ıth
i içi e	Significant of officer	Date CH	IEF FIDUCIARY COU		the preparer sho		_	٦
	Signature of officer		<del></del>			X Yes	<u>l</u>	No
	Pfint/Type preparer's name	Preparer's signature	Date	Check	ıf PTIN			
Paid	DAVIET TO DOTTOOM	1 1 DT A	11 14 10	self- employed	1	20401		
Prepa	le . Noticimos mas	1 Darl 1 / St	11-14-19			38401 -106577	2	
Use C	Only Firm's name DELOITTE TAX		· · · · · · · · · · · · · · · · · · ·	Firm's EIN	- 00-	1003//	۷	
	Firm's address PHILADELI	KET STREET, 25TH FLOOR		Dhora na	215-246-2	2300		
	LULI 2 9001622 LETTYNDEP	THIR, FR 13103-3304		I FROME NO.	~ + 40 - 2	, , , , ,		

Page 3

Schedule A - Cost of Goods	Sold. Enter	method of inven	itory v	aluation N/A	-				
1 Inventory at beginning of year	1		6	Inventory at end of yea	r		6		
2 Purchases	2		7	Cost of goods sold. Su	ıbtract l	ine 6			
3 Cost of labor	3			from line 5. Enter here	and in F	Part I,			
4a Additional section 263A costs				line 2			7		
(attach schedule)	4a		_ 8	Do the rules of section	263A (\	with respect to		Yes	No
<ul><li>Other costs (attach schedule)</li></ul>	4b		_	property produced or a	cquired	for resale) apply to			
5 Total. Add lines 1 through 4b	5			the organization?					<u> </u>
Schedule C - Rent Income ( (see instructions)	(From Real i	Property and	l Per	sonal Property L	ease	d With Real Prop	erty	) 	
1. Description of property									
(1)		<del>. – –</del>		<del>- · · · </del>					
(2)									
(3)									
(4)								.,	
	2. Rent receive	ed or accrued						-	
(a) From personal property (if the per rent for personal property is more 10% but not more than 50%)	centage of than	` of rent for p	personal	onal property (if the percentag property exceeds 50% or if ed on profit or income)	ge	3(a) Deductions directly columns 2(a) ar	connected (b) (	cted with the income in attach schedule)	1
(1)	<u> </u>								
(2)									
(3)									
(4)									
Total	0.	Total			0.				
(c) Total income. Add totals of columns here and on page 1, Part I, line 6, column	1 (A)	<b>•</b>			0.	(b) Total deductions. Enter here and on page 1, Part I, line 6, column (B)	<u> </u>		0.
Schedule E - Unrelated Deb	t-Financed	Income (see	ınstru	ctions)					
			2	. Gross income from		<ol><li>Deductions directly control to debt-finance</li></ol>	nected ed prop	with or allocable perty	
1. Description of debt-fir	nanced property			or allocable to debt- financed property	(a)	Straight line depreciation (attach schedule)	(b) Other deductions (attach schedule)		ıs
(1)	· <u>-</u>		1				1		
(2)									
(3)									
(4)									
<ol> <li>Amount of average acquisition debt on or allocable to debt-financed property (attach schedule)</li> </ol>	of or a	edjusted basis allocable to nced property h schedule)	6	6. Column 4 divided by column 5		7. Gross income reportable (column 2 x column 6)		8, Allocable deduct (column 6 x total of co 3(a) and 3(b))	
(1)				%					
(2)				%					
(3)				%					
(4)				%					
						nter here and on page 1, Part I, line 7, column (A).		Enter here and on pag Part I, line 7, column	
Totals				<b>&gt;</b>		0			0.
Total dividends-received deductions in	ncluded in column	18				<b>&gt;</b>	• 📗		٥.

			Exempt (	Controlled O	rganızatı	ons				-
Name of controlled organizat	10n <b>2</b>	e, Employer dentification number	3. Net unre (loss) (see	elated income instructions)	4. Tot payr	tal of specified ments made	include	t of column 4 to ad in the contration's gross i	olling	6. Deductions directly connected with income in column 5
(1)					,		<u> </u>			
(2)				-		•	•			
(3)										ر
(4)										
Nonexempt Controlled Organi	zations			·····						
7. Taxable Income	8. Net unrelated (see instru		9. Total	of specified payi made	nents	10. Part of colur in the controlli gross	nn 9 that ng organ s income	is included ization's		uctions directly connected ncome in column 10
(1)										*
(2)										
(3)								****		· · · · · · · · · · · · · · · · · · ·
(4)	<del></del>									<del></del>
Totals		- ,		١.	•	Add colum Enter here and line 8, c		1, Part I,	Enter he	I columns 6 and 11 / re and on page 1, Part I, ne 8, column (B)
Schedule G - Investme	nt Income of	a Section	1 501(c)(7	'), (9), or (	17) Org	anization				<u> </u>
(see insti				,, (-,, (	,	<b>,</b>				
1. Desc	ription of income			2. Amount of	ıncome	3. Deduction directly conne (attach sched	cted	4. Set-		5. Total deductions and set-asides (col 3 plus col 4)
(1)				,						
(2)			-					,		
(3)							-			
(4)									•	<del> </del>
Totals		,		Enter here and Part I, line 9, co						Enter here and on page 1, Part I, line 9, column (8)
Schedule I - Exploited (see instru	•	ity Incom	e, Other	Than Adv	ertisin/	g Income	·	•	ï	
1. Description of exploited activity	2. Gross unrelated business income from trade or business	s directly with p	expenses connected production related sss income	4. Net incon from unrelated business (co minus colum gain, comput through	f trade or olumn 2 n 3) If a e cols 5	5. Gross inco from activity t is not unrelat business inco	hat ed	6. Exp attribute colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)
(1)									-	
(2)							7			
(3)										
(4)										
Totals	Enter here and on page 1, Part I, line 10, col (A)	page	nere and on 1, Part I, 0, col (B)		29					Enter here and on page 1, Part II, line 26
Schedule J - Advertision	ng Income (s	see instructio	ns)							
<u>Part</u> i Income From t	Periodicals R	eported o	on a Cons	solidated	Basis					
, 1. Name of periodical	2. Gro advertis incon	sing	3. Direct vertising costs					6. Reade		7. Excess readership costs (column 6 minus column 5, but not more than column 4)
(1)	<u> </u>				Maria La	76	-	-		
(2)	<u> </u>					5°% '.5				
(3)						<u> </u>			- f	
(4)	1					<b>#</b>			<del> </del> [	
177	1			SHARE AND THE	**************************************	<del></del>			<del> </del>	* ************************************
Totals (carry to Part II, line (5))	<b>&gt;</b>	0.	0	),						0. Form <b>990-T</b> (2018

### Form 990-T (2018) J. N. PEW JR. CHARITABLE TRUST 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 o	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)		Ì					Ī	
(3)								
(4)								
Totals from Part I		•	0.	0.				0.
·			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		<b>&gt;</b>	0.	0.				0.

, 1. Name	2. Title	<ol> <li>Percent of time devoted to business</li> </ol>	Compensation attributable to unrelated business
(1)		%	
(2)		%	
(3)		%	
(4)	,	%	
Total. Enter here and on page 1, Part II, line 14		•	0

Form 990-T (2018)

### **SCHEDULE D** (Form 1041)

**Capital Gains and Losses** 

► 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.

OMB No. 1545-0092

Department of the Treasury Internal Revenue Service Name of estate or trust

Employer identification number

J. N	. PEW JR. CHARITABLE TRUST				23-	6299309
	Form 5227 filers need to complete only Parts I and II.					
Pa	ort I Short-Term Capital Gains and Losses-Gene	erally Assets He	eld One Year or	Less (See	instr	uctions)
	orm may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmen to gain or lose Form(s) 8949,	s from Part I,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (q)
				line 2, colum	ın (g)	with column (g)
1 a	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></b>		
1 b	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			1		1,043.
4	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	4			4	
5	Net short-term gain or (loss) from partnerships, S corporations, and other	er estates or trusts	_		5	
6	Short-term capital loss carryover. Enter the amount, if any, from line 9 of	the 2017 Capital Loss				
	Carryover Worksheet	·			6	(
7	Net short-term capital gain or (loss). Combine lines 1a through 6 in colu	umn (h). Enter here and	on line 17,			
	column (3) on page 2	( )	·	•	7	1,043.
Pa	ort II Long-Term Capital Gains and Losses-Gene	erally Assets He	ld More Than C	ne Year (	See ir	nstructions)
	orm may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	Adjustmento gain or loss Form(s) 8949,	s from Part II,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8 a	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	1		line 2, colum	iii (g)	Will Column (g)
8 b	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					114,505.
11	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and	d 8824			11	
12	Net long-term gain or (loss) from partnerships, S corporations, and other	r estates or trusts			12	
13	Capital gain distributions				13_	
14	Gain from Form 4797, Part I				14	
15	Long-term capital loss carryover. Enter the amount, if any, from line 14 o	f the 2017 Canital Locc			···	
	Carryover Worksheet	•			15	(
16	Net long-term capital gain or (loss). Combine lines 8a through 15 in col column (3) on page 2	iumn (h). Enter here and	o on line 18a,	•	16	114,505.

Schedule D (Form 1041) 2018 J. N. PEW JR. CHARITABLE TRUST				23-62	99309 Page 2
Part III Summary of Parts I and II		(1) Beneficiaries'	(2)	Estate's	(3) Total
Caution: Read the instructions before completing this part.			or	trust's	
17 Net short-term gain or (loss)	17			1,04	13. 1,043.
18 Net long-term gain or (loss):					
a Total for year	18a			114,50	114,505.
b Unrecaptured section 1250 gain (see line 18 of the worksheet)	18b				
c 28% rate gain	18c				
19 Total net gain or (loss). Combine lines 17 and 18a	19			115,54	18. 115,548.
Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or l	Form 990-T.	Part I. line 4a) If line	s 18a an	d 19. coli	umn (2), are net gains.
go to Part V, and don't complete Part IV If line 19, column (3), is a net loss, com					
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), th	ne smaller of:			<del></del>
a The loss on line 19, column (3) or b \$3,000				20 (	)
Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page	ne 1. line 22 i	or Form 990-T. line 3	38). ıs a l	oss. com	polete 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 gain	s, or an amou	nt is entered in Part I o	r Part II a	nd there is	s 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 instruction	tions if				-1
• 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  • 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	d dividends ar	e included in income in	Part I of I	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	e instructions i	if either line 18b, col. (2	) or line 1	18c, col. (2	2) is more than zero.
21 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)	2.				
22 Enter the smaller of line 18a or 19 in column (2)	-	ĺ	•		
but not less than zero					
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-		,			
26 Subtract line 25 from line 24. If zero or less, enter -0-	26	5			
27 Subtract line 26 from line 21. If zero or less, enter -0-	27	<del></del>			
28 Enter the smaller of the amount on line 21 or \$2,600	28	<u> </u>			
29 Enter the smaller 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%				30	
31 Enter the smaller of line 21 or line 26	31	ı <b>İ</b>			····
32 Subtract line 30 from line 26	32				
33 Enter the smaller of line 21 or \$12,700	33				
<b>34</b> Add lines 27 and 30	. 34				
35 Subtract line 34 from line 33. If zero or less, enter -0-	3:	<del></del>			
36 Enter the smaller of line 32 or line 35	36				
37 Multiply line 36 by 15% (0.15)		, ,		37	
38 Enter the amount from line 31	38	.		- <del> </del>	
39 Add lines 30 and 36	39				
40 Subtract line 39 from line 38. If zero or less, enter -0-	40	<del></del>			
40 Subtract line 39 from line 36. If zero or less, enter -0-	_4(	<u>,                                     </u>		41	
42) Figure the tax on the amount on line 27. Use the 2018 Tax Rate Schedule for Estates	1	1		7'	
and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42	,			
•					
<ul><li>43 Add lines 37, 41, and 42</li><li>44 Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates</li></ul>	43	·			
•		. 1			
and Trusts (see the Schedule G instructions in the instructions for Form 1041)	1041 Schedu				
45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form G, line 1a (or Form 990-T, line 40)	1041, SCHEOL	116		45	
U, INIC 14 (UI FUITI 330°1, IIIIC 40)			<b>•</b>	40	

### J. N. PEW JR. CHARITABLE TRUST

23-6299309

FORM 990-T	CONTRIBUTIONS	STATEMENT 1		
DESCRIPTION/KIND OF PROPERTY	METHOD USED TO DETERMINE FMV	AMOUNT		
CASH TO THE PEW CHARITABLE TRUSTS EIN 56-2307147	N/A	18,269,806.		
TOTAL TO FORM 990-T, PAGE 1, L	INE 20	18,269,806.		

### J. N. PEW JR. CHARITABLE TRUST

FORM 990-T	CONTRIBUTIONS SUMMARY		STATEMENT	2
CARRYOVER OF PRIOR YEARS	UNUSED CONTRIBUTIONS			
FOR TAX YEAR 2013 FOR TAX YEAR 2014 FOR TAX YEAR 2015 FOR TAX YEAR 2016 FOR TAX YEAR 2017	16,682,533 17,059,908 17,624,339 17,232,054 17,719,251			
TOTAL CARRYOVER TOTAL CURRENT YEAR 50% C	CONTRIBUTIONS	86,318,085 18,269,806		
TOTAL CONTRIBUTIONS AVAITAXABLE INCOME LIMITATION		104,587,891 0	_	
EXCESS 50% CONTRIBUTIONS TOTAL EXCESS CONTRIBUTION		104,587,891 104,587,891	_	
ALLOWABLE CONTRIBUTIONS	DEDUCTION		_	0
TOTAL CONTRIBUTION DEDUC	TION			0

Internal Revenue Service

### **Sales and Other Dispositions of Capital Assets**

► Go to www.irs.gov/Form8949 for instructions and the latest information. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. OMB No 1545-0074

Name(s) shown on return

Social security number or taxpayer identification no.

23-6299309

J. N. PEW JR. CHARITABLE TRUST

Before you check Box A, B, or C 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

Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term

transactions, see page 2

Note: You may aggregate all short-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 1a, you aren't required to report these transactions on Form 8949 (see instructions)

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-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

- (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

1. TO Short-term transactions no	i reported to you	1 011 1 01111 1 1 0 3 3 1	<u> </u>				
1 (a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo , day, yr)	(c) Date sold or disposed of (Mo., day, yr)	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see Column (e) in the instructions	loss. If y in column	nt, if any, to gain or ou enter an amount (g), enter a code in ). See instructions.  (g)  Amount of adjustment	(h) Gain or (loss). Subtract column (e) from column (d) & combine the result with column (g)
NET SHORT TERM CAPITAL					ļ		
GAIN/(LOSS) FROM							
PARTNERSHIPS		<u> </u>					1,043.
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					<del> </del>		<del></del>
	1			<u> </u>	<del> </del>		<u> </u>
	<del> </del>	<del></del>	,		<del></del>		<del></del>
	<del> </del>			<u> </u>	<del> </del>		<del> </del>
				<del>-</del>	<u> </u>		
				<del>                                     </del>			
	<u> </u>						-
	· · ·			<del> </del>	<u> </u>		<u> </u>
			L	<del> </del>	<del>                                     </del>		
	<u> </u>	L	<del></del>	<del> </del>	-		
2 Totals. Add the amounts in coluinegative amounts) Enter each to Schedule D, line 1b (if Box A about 1) and 10 an	otal here and incli ove is checked),	ude on your line 2 (if Box B					1,043.
above is checked), or line 3 (if B	ox C above is ch	пескеа)		1	l	I _	1,043.

Note: If you checked Box A 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

Name(s) shown on return Name and SSN or taxpayer identification no not required if shown on page 1

Social security number or taxpayer identification no.

J. N. PEW JR. CHARITABLE TRUST

23-6299309

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 generally long-term (see instructions). 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

X (F) Long-term transactions no	ot 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 of (Mo , day, yr )	(d) Proceeds (sales price)	(e) Cost or other basis See the Note below and	loss. If y in column	nt, if any, to gain or ou enter an amount (g), enter a code in ). See instructions.	(h) Gain or (loss). Subtract column (e) from column (d) & combine the result
				see Column (e) in the instructions	Code(s)	(g) Amount of adjustment	with column (g)
NET LONG TERM CAPITAL							
GAIN/(LOSS) FROM							
PARTNERSHIPS							114,505.
				<u> </u>			
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	+						
	1			<del>                                     </del>			
-							
						<del></del>	
				<u> </u>			
2 Totals. Add the amounts in col							
negative amounts) Enter each		•	:				
Schedule D, line 8b (if Box D a							114 505
above is checked), or line 10 (il	Box F above is c	hecked)			I	l	114,505.

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

## SCHEDULE D (Form 1041)

**Capital Gains and Losses** 

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.

OMB No. 1545-0092

**2018** 

Department of the Treasury (Internal Revenue Service

Name of estate or trust

Employer identification number

J.N	I. PEW JR CHARITABLE TRUST				23-	6299309
	Form 5227 filers need to complete only Parts I and II.					
Pa	rt I Short-Term Capital Gains and Losses-Gene	erally Assets He	eld One Year or	Less (See	instr	uctions)
	estructions for how to figure the amounts to enter on the lines below.  orm may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmen to gain or loss Form(s) 8949,	from	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result
				line 2, columi	າ (g)	with column (g)
1 a	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	و		Land Brook and Talk		
	these transactions on Form 8949, leave this line blank and go to line 1b				MAC.	···
1 b	Totals for all transactions reported on Form(s) 8949 with			1		
	Box A checked		- Custon			
2	Totals for all transactions reported on Form(s) 8949 with			<b>5</b> 1		•
	Box B checked					
3	Totals for all transactions reported on Form(s) 8949 with					
	Box C checked	<u> </u>				
4	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824			1	4	
5	Net short-term gain or (loss) from partnerships, S corporations, and other	er estates or trusts	SEE STATE	MENT 4	5	1,043.
6	Short-term capital loss carryover. Enter the amount, if any, from line 9 of	the 2017 Capital Loss				•
	Carryover Worksheet				6_	( )
7	Net short-term capital gain or (loss). Combine lines 1a through 6 in solu	umh (th). Enter here and	d on line 17,			
	column (3) on page 2				7	1,043.
₹Pa	rtill Long-Term Capital Gains and Losses-Gene	Fally Assets He	eld More Than C	ne Year (S	See ir	structions)
See ir	nstructions for how to figure the amounts to enter on the light below	(d)	(e)	(g)	to	(h) Gain or (loss) Subtract column (e)
This f	orm may be easier to complete if you round off cents to whole dollars	Proceeds (sales price)	Cost (or other basis)	Adjustmen to gain or loss Form(s) 8949, line 2, colum	from Part II,	from column (d) and combine the result with column (g)
8 a	Totals for all long-term transactions reported an Form 1098-B for			<b>3.</b> 4.3	5	
• •	which basis was reported to the IRS and to which you have no	,		1		
	adjustments (see instructions). However, if you choose to report all					
	these transactions on Form 8949, leave this line blank and go to line 8b					
8 b	Totals for all transactions reported on Form(s) 8949 with					
	Box D checked					
9	Totals for all transactions reported on Form(s) 8949 with	<u> </u>			-	
	Box E checked					
10	Totals for all transactions reported on Form(s) 8949 with		1			
	Box F checked			<u> </u>		<u></u>
	•					
11	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and	d 8824		•	11	
-		,				•
12	Net long-term gain or (loss) from partnerships, S corporations, and other	r estates or trusts	SEE STATE	MENT 5	12	< <u>18,569.</u>
		4				
13	Capital gain distributions			`	13	
14	Gain from Form 4797, Part I				14	133,074.
15	Long-term capital loss carryover. Enter the amount, if any, from line 14 o	f the 2017 Capital Loss	<b>.</b>			
	Carryover Worksheet			•	15	<u> </u>
16	Net long-term capital gain or (loss). Combine lines 8a through 15 in col	lumn (h). Enter here an	id on line 18a,	_		114 505
	column (3) on page 2	,			16	114,505.

<u>Sch</u>	edule D (Form 1041) 2018					Page 2
W.	Summary of Parts I and II		(1) Beneficiaries'	(2)	Estate's	1 (3) Total
	Caution: Read the instructions before completing this part.				trust's	
17	Net short-term gain or (loss)	17_			1,043.	1,043.
18	Net long-term gain or (loss):					
	Total for year	18a			<u>4,505.</u>	114,505.
ı	Unrecaptured section 1250 gain (see line 18 of the worksheet)	18b	<u></u>	1	3,010.	13,010.
(	: 28% rate gain	18c				
19	Total net gain or (loss). Combine lines 17 and 18a	19		11	<u>5,548.</u>	115,548.
Not	E: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 9	90-T,	Part I, line 4a) If lines	18a and	d 19, colum	n (2), are net gains,
	to Part V, and don't complete Part IV If line 19, column (3), is a net loss, complete F	Part IV	and the Capital Loss (	Carryover	Worksheet,	as necessary
ξĘ	art IV					
20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a tri	ust), th	e smaller of:			
	a The loss on line 19, column (3) or b \$3,000				20 (	)
Not	E: If the loss on line 19, column (3), is more than \$3,000, of if Form 1041, page 1, lii	ne 22 (	or Form 990-T, line 3	18), is a li	oss, comple	ete the Capital
	s Carryover Worksheet in the instructions to figure your capital loss carryover					
	art V Tax Computation Using Maximum Capital Gains Rate					·
For	n 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or a	n amou	nt is entered in Part I oi	Part II a	nd there is an	n entry on Form 1041,
lıne	2b(2), and Form 1041, line 22, is more than zero.		_			
Cau	tion: 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					
	m 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified divide					
38,	is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instru	ctions	Conhectage 18b, col. (2	) or line	8c, col. (2) is	s more than zero.
21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)					
22	Enter the smaller of line 18a or 19 in column (2)					
	but not less than zero 22				<b>蒸</b> 和。	
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)					
24	Add lines 22 and 23					
25	If the estate or trust is filing Form 4952, enter the	1.4%	`.			
	amount from line 4g; otherwise, enter -0-		<u> </u>			f
26	Subtract line 25 from line 24. If zero or less, enter -0-	26	i			
27	Subtract line 26-from line 21. If zero or less, enter -0-	27	, [			
28	Enter the smaller of the amount on line 21 or \$2,680	28	1			
29	Enter the smaller of the amount on line 27 or the 28	29				
30	Subtract line 29 from line 28. If zero or less enter 0. This amount is taxed at 0%			<b></b>	30	
31	Enter the smaller of line 21 or line 26	31				
32	Subtract line 30 from line 26	32	2			
33	Enter the smaller of line 21 or \$12,700	33	<u> </u>			
34	Add lines 27 and 30	34				
35	Subtract line 34 from line 33. If zero or less, enter -0-	35	<b>5</b>	•		
36	Enter the smaller of line 32 or line 35	36	<b>3</b> /			
37	Multiply line 36 by 15% (0.15)			<b></b>	37	
38	Enter the amount from line 31	38	ı			
	Add lines 30 and 36	39				
40	Subtract line 39 from line 38. If zero or less, enter -0-	40				
	Multiply line 40 by 20% (0.20)			<b></b>	41	
	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	<u>,</u>		- 変	1
43	Add lines 37, 41, and 42	43		0.		
	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	Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041,	_				
	G, line 1a (or Form 990-T, line 40)			•	45	. 0.
	ala. /a a		~		0-1-	I- D /F 4044\ 2040

### SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service ALTERNATIVE MINIMUM TAX Capital Gains and Losses

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.

OMB No. 1545-0092

2018

Name of estate or trust

Employer identification number

<u>J.1</u>	I. PEW JR CHARITABLE TRUST			<u> </u>	23-	6299309
	Form 5227 filers need to complete only Parts I and II.					
<u>Pa</u>	art 😥 Short-Term Capital Gains and Losses-Gene	rally Assets He	eld One Year or	Less (See	instr	uctions)
	istructions for how to figure the amounts to enter on the lines below.  Orm may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmer to gain or loss Form(s) 8949, line 2, colum	from Part I,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1 a	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		ر			
	adjustments (see instructions). However, if you choose to report all					
	these transactions on Form 8949, leave this line blank and go to line 1b					
1 b	Totals for all transactions reported on Form(s) 8949 with					
	Box A checked			<u> </u>		
2	Totals for all transactions reported on Form(s) 8949 with	C	· •	L		
	Box B checked					
3	Totals for all transactions reported on Form(s) 8949 with					,
	Box C checked			<u> </u>	1	<u>``</u>
4	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824				4	
_	Not about town and or (local) form and town to Comment to and other		SEE STATEM	CENTO C	_	1 042
5	Net short-term gain or (loss) from partnerships, S corporations, and other		SEE SIAIE	TENI 0	5	1,043.
6	Short-term capital loss carryover. Enter the amount, if any, from line 9 of to Carryover Worksheet	ile Zes I / Cabi sa Loss			6	,
7	Net short-term capital gain or (loss). Combine lines 1a through 6 in the	m (th) Enter Sere and	t on line 17		-	
•	column (3) on page 2	A Lincoln and	3 011 1110 17,	•	7	1,043.
⊴ Pa	Intil Long-Term Capital Gains and Losses-Gene	ally Assets He	ld More Than O	ne Year (	See in	
	orm may be easier to complete if you round off cents to whole dollars	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustmer to gain or loss Form(s) 8949, line 2, colum	s from Part II,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8 a	Totals for all long-term transactions reported in Form 1899-B for					
	which basis was reported to the IRS and for which you have no				- Akk	
	adjustments (see instructions). However, if you choose to report all					,
	these transactions on Form 8949, leave this line blank and go to line 8b		*****		2	` `
8 ь	Totals for all transactions reported on Form(s) 8949 with		t			
	Box D checked					
9	Totals for all transactions reported on Form(s) 8949 with					
	Box E checked		-	ļ. <del></del>		
10	Totals for all transactions reported on Form(s) 8949 with  Box F checked				.	
	DUX F CHECKED		<del></del>	!	T	<del></del>
11	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and	8824			11	
12	Net long-term gain or (loss) from partnerships, S corporations, and other e	estates or trusts	SEE STATEM	MENT 7	12	< <b>45,459.</b> >
13	Capital gain distributions			•	13	
14	Gain from Form 4797, Part I				14	133,062.
15	Long-term capital loss carryover. Enter the amount, if any, from line 14 of Carryover Worksheet		í	(	15	· ()
16	Net long-term capital gain or (loss). Combine lines 8a through 15 in colu	mn (h). Enter here an	d on line 18a,			0.7.44
	column (3) on page 2	,		▶	16	87,603.

Schedule D (Form 1041) 2018 ALTERNATIVE MINI	MUM	TAX		Page 2
©Part:III Summary of Parts I and II		(1) Beneficiaries'	(2) Estate's	(3) Total
Caution: Read the instructions before completing this part.		·	or trust's	-, <u>-</u>
17 Net short-term gain or (loss)	17		1,043.	1,043.
18 Net long-term gain or (loss):				
a Total for year	18a		87,603.	87,603.
b Unrecaptured section 1250 gain (see line 18 of the worksheet)	18b		13,010.	13,010.
c 28% rate gain	18c			
19 Total net gain or (loss). Combine lines 17 and 18a	19		88,646.	88,646.
Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 9	90-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 F				
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 true	ust), th	e smaller of:	_	
a The loss on line 19, column (3) or b \$3,000			20 (	)
Note: If the loss on line 19, column (3), is more than \$3,000, of if Form 1041, page 1, lir Loss Carryover Worksheet in the instructions to figure your capital loss carryover.	ne 22 (	or Form 990-T, line 3	8), is a loss, complete	the Capital
Part V Tax Computation Using Maximum Capital Gains Rate	25			
Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an		nt is entered in Part I or	Part II and there is an e	ntry on Form 1041
line 2b(2), and Form 1041, line 22, is more than zero.	aniou	m is emered in Part I UI	1 411 11 4114 111616 15 411 6	nayonroin 1041,
Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if	,		<u></u>	
• 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  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 divide	ends are	uncluded in ligeome in	Part I of Form 990-T. ai	nd Form 990-T. line
38, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instru				
21 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)	<b>2</b> 1		· · · ·   · · · · · · · · · · · · · ·	
22 Enter the smaller of line 18a or 19 in column (2)		-	44 9	
but not less than zero 22 87,603			2.2	
23 Enter the estate's or trust's qualified dividends from	Z		100	
Form 1041, line 2b(2) (or enter the qualified dividends		,		
included in income in Part I of Form 990-T) 23	<b>)</b>   ·	,	.	
24 Add lines 22 and 23 24 87 693	•			
25 If the estate or trust is filing Form 4952, enter the	٦.		13.53	
amount from line 4g; otherwise, enter -0-	• : ' `		33	
26 Subtract line 25 from line 24. If zero or less, enter -0-	26	87,	603.	
27 Subtract line 26 from line 21. If zero or less, enter -0-	27		38,2	,
28 Enter the smaller of the amount on line 21 or \$2,600	28			
29 Enter the smaller of the amount on line 27 or une 28	29	1	<u> </u>	
30 Subtract line 29 from line 28. If zero or less tenter 0. This amount is taxed at 0%	_	,	▶ 30	Α
31 Enter the smaller of line 21 or line 26	31			
32 Subtract line 30 from line 26	32	!		
33 Enter the smaller 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 smaller of line 32 or line 35 REMAINING LINES NOT	AB	PLICABLE TO	AMT CALC.	
<b>37</b> Multiply line 36 by 15% (0.15)	1	1	<b>▶</b> 37	
38 Enter the amount from line 31	38			
<b>39</b> Add lines 30 and 36	39	-		
40 Subtract line 39 from line 38. If zero or less, enter -0-	40	1 1	<u>225</u>	
41 Multiply line 40 by 20% (0.20)	1	į.	<b>▶</b> 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 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041,	Schedu	ile	_	
G, line 1a (or Form 990-T, line 40)			▶ 45	

Form 8801

Department of the Treasury Internal Revenue Service (99)

# Credit for Prior Year Minimum Tax - Individuals, Estates, and Trusts

► Go to www.irs.gov/Form8801 for instructions and the latest information.

Attach to Form 1040, 1040NR, or 1041.

2018

OMB No 1545-1073 \*

Name(s) shown on return

Identifying number

J.N. PEW JR CHARITABLE TRUST		23-6299309
Part I∄ Net Minimum Tax on Exclusion Items	,	
1 Combine lines 1, 6, and 10 of your 2017 Form 6251 Estates and trusts,	see instructions 1	
·		
2 Enter adjustments and preferences treated as exclusion items (see instr	ructions) 2	
	,	
3 Minimum tax credit net operating loss deduction (see instructions).		(
4 Combine lines 1, 2, and 3 If zero or less, enter -0- here and on line 15 ar		46 411
than \$249,450 and you were married filing separately for 2017, see insti		46,411.
	54,300 if single or head of household for	
5 Enter \$84,500 if married filing jointly or qualifying widow(er) for 2017, \$5	The second secon	04 100
2017, or \$42,250 if married filing separately for 2017 Estates and trusts	s, enter \$24,100 5	24,100.
6 Enter \$160,900 if married filing jointly or qualifying widow(er) for 2017,	5120,700 if single or head of household	00 450
for 2017, or \$80,450 if married filing separately for 2017. Estates and true	usts, enter \$80,450 6	80,450.
<b>-</b> 0 1111 061 4 K11111111		0.
7 Subtract line 6 from line 4 If zero or less, enter -0- here and on line 8 and	d go to line 9	0.
0. Multiply line 7 by 0507 (0.05)		
8 Multiply line 7 by 25% (0 25)	8	
O Subtract line 8 from line 5 If you ar long antay 0 If under one 20 at the	e end of 2017, see instructions 9	24,100.
9 Subtract line 8 from line 5 If zero or less, enter -0- If under age 27 at 10	erid dizzo 17, see instructions	24,100.
10 Subtract line 9 from line 4 If zero or less, enter -0- here and online 15 al	nd go to Part II. Form	
1040NR filers, see instructions	10	22,311.
10-40141 micra, see mandenona	En la company	22,311.
11 • If for 2017 you filed Form 2555 or 2555-EZ, see instructions for the ar	mount to enter	
<ul> <li>If for 2017 you reported capital gain discributions directly on Form 10-</li> </ul>		
dividends on Form 1040, line 9b (Form 1041), line 2b(2))? or you had a g		
Schedule D (Form 1040) (lines 18a and 19 column (2), of Schedule D (F		3,455.
Form 8801 and enter the amount from inc 55 here. Form 1040NR filers,	, see instructions	
• All others: If line 10 is \$187,800 or less (\$93,900 or less if married filing	ng separately for 2017), multiply	
line 10 by 26% (0 26) Otherwise, multiply line 10 by 28% (0 28) and sub	1 1%, 1	
filing separately for 2017) from the result. Form 1040NR filers, see instru		
12 Minimum tax foreign tax credit on exclusion items (see instructions)	· 12	
•	·	
13 Tentative minimum tax on exclusion items. Subtract line 12 from line 11	13	3,455.
		ì
14 Enter the amount from your 2017 Form 6251, line 34, or 2017 Form 104	11, Schedule I, line 55	5,135.
·		
15 Net minimum tax on exclusion items. Subtract line 14 from line 13 If	zero or less, enter -0-	0.
LHA For Paperwork Reduction Act Notice, see instructions.		Form 8801 (2018

rm 8801 (2018)		Page 2
art II Minimum Tax Credit and Carryforward to 2019		
Enter the amount from your 2017 Form 6251, line 35, or 2017 Form 1041, Schedule I, line 56	16	<del> </del>
Enter the amount from line 15	17	
Subtract line 17 from line 16. If less than zero, enter as a negative amount	18	
2017 credit carryforward. Enter the amount from your 2017 Form 8801, line 26	19	121,059.
Enter your 2017 unallowed qualified electric vehicle credit (see instructions)	20	
Combine lines 18 through 20 If zero or less, stop here and see the instructions	21	121,059.
Enter your 2018 regular income tax liability minus allowable credits (see instructions)	22	
Enter the amount from your 2018 Form 6251, line 9, or 2018 Form 1041, Schedule I, line 54	23	
Subtract line 23 from line 22 If zero or less, enter -0-	24	0.
Minimum tax credit. Enter the smaller of line 21 or line 24. Also enter this amount on your 2018. Schedule 3 (Form 1040), line 54 (check box b), Form 1040NR, line 51 (check box b), or Form 1641, Schedule G, line 2c.	25	
Credit carryforward to 2019. Subtract line 25 from line 21 Keep a record of this amount because you may use it in future years	26	121,059.
		Form <b>8801</b> (2018)
	Enter the amount from your 2017 Form 6251, line 35, or 2017 Form 1041, Schedule I, line 56  Enter the amount from line 15  Subtract line 17 from line 16 If less than zero, enter as a negative amount  2017 credit carryforward. Enter the amount from your 2017 Form 8801, line 26  Enter your 2017 unallowed qualified electric vehicle credit (see instructions)  Combine lines 18 through 20 If zero or less, stop here and see the instructions  Enter your 2018 regular income tax liability minus allowable credits (see instructions)  Enter the amount from your 2018 Form 6251, line 9, or 2018 Form 1041, Schedule I, line 54  Subtract line 23 from line 22 If zero or less, enter -0-  Minimum tax credit. Enter the smaller of line 21 or line 24 Also enter this amount on your 2018 Schedule 3 (Form 1040), line 54 (check box b), Form 1040NR, line 51 (check box b), or Form 1641, Schedule G, line 2c  Credit carryforward to 2019. Subtract line 25 from line 21 Keep a record of this amount because	Enter the amount from your 2017 Form 6251, line 35, or 2017 Form 1041, Schedule I, line 56  Enter the amount from line 15  Subtract line 17 from line 16 If less than zero, enter as a negative amount  18  2017 credit carryforward. Enter the amount from your 2017 Form 8801, line 26  Enter your 2017 unallowed qualified electric vehicle credit (see instructions)  Combine lines 18 through 20 If zero or less, stop here and see the instructions  21  Enter your 2018 regular income tax liability minus allowable credits (see instructions)  22  Enter the amount from your 2018 Form 6251, line 9, or 2018 Form 1041, Schedule I, line 54  Subtract line 23 from line 22 If zero or less, enter -0-  Minimum tax credit. Enter the smaller of line 21 or line 24 Also enter this amount on your 2018. Schedule 3 (Form 1040), line 54 (check box b), Form 1040NR, line 51 (check box b), or Form 1041, Schedule G, line 2c  Credit carryforward to 2019. Subtract line 25 from line 21 Keep a record of this amount because

#### Partill Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 11 or by the Foreign Earned Income Tax Worksheet in the instructions

Caution: If you didn't complete the 2017 Qualified Dividends and Capital Gain Tax Worksheet, the 2017 Schedule D Tax Worksheet, or Part V of the 2017 Schedule D (Form 1041), see the instructions before completing this part

- Enter the amount from Form 8801, line 10 If you filed Form 2555 or 2555-EZ for 2017, enter the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions Caution: If for 2017 you filed Form 1040NR, 1041, 2555, or 2555-EZ, see the instructions before completing lines 28, 29, and 30
- 28 Enter the amount from line 6 of your 2017 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 13 of your 2017 Schedule D Tax Worksheet, or the amount from line 26 of the 2017 Schedule D (Form 1041), whichever applies\*
  If you figured your 2017 tax using the 2017 Qualified Dividends and Capital Gain Tax

If you figured your 2017 tax using the 2017 Qualified Dividends and Capital Gain Tax Worksheet, skip line 29 and enter the amount from line 28 on line 30. Otherwise, go to line 29.

- Enter the amount from line 19 of your 2017 Schedule D (Form 1040), or line 18b, column (2), of the 2017 Schedule D (Form 1041)
- 30 Add lines 28 and 29, and enter the smaller of that result or the amount from line 10 of your 2017 Schedule D Tax Worksheet
- 31 Enter the smaller of line 27 or line 30
- 32 Subtract line 31 from line 27
- 33 If line 32 is \$187,800 or less (\$93,900 or less if married filing separately for 2017), multiply line 32 by 26% (0 26). Otherwise, multiply line 32 by 28% (0 28) and subtract \$3,756 (\$1,870) if married filing separately for 2017) from the result. Form 1040NR filers, see instructions
- 34 Enter
- \$75,900 if married filing jointly or qualifying widow(er) fg/2017
- \$37,950 if single or married filing separately for 2017,
- \$50,800 if head of household for 2017, or
- \$2,550 for an estate or trust.

Form 1040NR filers, see instructions

- Enter the amount from line 7 of your 2017 Qualified Differings and Capital Gain Tax Worksheet, the amount from line 14 of your 2017 Schedule D Tax Worksheet, or the amount from line 27 of the 2017 Schedule D (Form 1041), whichever applies If you'd don't complete either worksheet or Part V of the 2017 Schedule D (Form 1041), enter the prioring from 2017 Form 1040, line 43, or 2017 Form 1041, line 22, whichever applies, if zeroor less enter 0. Form 1040NR filers, see instructions
- 36 Subtract line 35 from line 34 If zero teless enter -0
- 37 Enter the smaller of line 27 or 10 28
- 38 Enter the smaller of line 36 or life
- 39 Subtract line 38 from line 37
- 40 Enter
- \$418,400 if single for 2017,
- \$235,350 if married filing separately for 2017,
- \$470,700 if married filing jointly or qualifying widow(er) for 2017,
- \$444,550 if head of household for 2017, or
- \$12,500 for an estate or trust

Form 1040NR filers, see instructions

- 41 Enter the amount from line 36
- 42 Form 1040 filers, enter the amount from line 7 of your 2017 Qualified Dividends and Capital Gain Tax / Worksheet or the amount from line 19 of your 2017 Schedule D Tax Worksheet, whichever applies If you didn't complete either worksheet, see instructions Form 1041 filers, enter the amount from line 27 of your 2017 Schedule D (Form 1041) or line 18 of your 2017 Schedule D Tax Worksheet, whichever applies If you didn't complete either the worksheet or Part V of the 2017 Schedule D (Form 1041), enter the amount from your 2017 Form 1041, line 22, if zero or less, enter -0- Form 1040NR filers, see instructions

<sup>\*</sup> The 2017 Qualified Dividends and Capital Gain Tax Worksheet is in the 2017 Instructions for Form 1040. The 2017 Schedule D Tax Worksheet is in the 2017 Instructions for Schedule D (Form 1040) (or the 2017 Instructions for Schedule D (Form 1041)).

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For	n 8801 (2018)		Page 4
Pa	rt III Tax Computation Using Maximum Capital Gains Rates (continued)		
			2 550
43	Add lines 41 and 42	43	2,550. 9,950.
44	Subtract line 43 from line 40 If zero or less, enter -0-	44	
45	Enter the smaller of line 39 or line 44	45	9,950.
46	Multiply line 45 by 15% (0 15)	46	1,493. 12,500.
47	Add lines 38 and 45	47	12,500.
	If lines 47 and 27 are the same, skip lines 48 through 52 and go to line 53. Otherwise, go to		
	line 48.		0 011
48	Subtract line 47 from line 37	48	9,811. 1,962.
49	Multiply line 48 by 20% (0 20)	49	1,902.
	If line 29 is zero or blank, skip lines 50 through 52 and go to line 53. Otherwise, go to line 50.		22 211
50	Add lines 32, 47, and 48	50	22,311.
51	Subtract line 50 from line 27	51	
52	Multiply line 51 by 25% (0 25)	52	2 / E E
53	Add lines 33, 46, 49, and 52	53	3,455.
54	If line 27 is \$187,800 or less (\$93,900 or less if married filing separately for 2017), multiply line 27	1 1	
	by 26% (0 26) Otherwise, multiply line 27 by 28% (0 28) and subtract \$3,756 (\$1,878 if married filing		E 0.01
	separately for 2017) from the result. Form 1040NR filers, see instructions	54	5,801.
55	Enter the smaller of line 53 or line 54 here and on line 11 If you filed Form 2555 or 2555-EZ for		
	2017, don't enter this amount on line 11. Instead, enter it on line 4 of the Foreign Earned Indirate		2 455
	Tax Worksheet in the instructions for line 11	55	3 , 455 • Form <b>8801</b> (2018)

### SCHEDULE I (Form 1041)

### **Alternative Minimum Tax - Estates and Trusts**

Attach to Form 1041.

Department of the Treasury
Internal Revenue Service

Go to www.irs gov/Form1041 for instructions and the latest information.

OMB No 1545-0092

2017

0.

Schedule I (Form 1041) (2017)

Employer identification number Name of estate or trust J.N. PEW JR CHARITABLE TRUST 23-6299309 | Part | | Estate's or Trust's Share of Alternative Minimum Taxable Income 30,810. 1 Adjusted total income or (loss) (from Form 1041, line 17) 2 Interest 2 3 Taxes 3 15,601 Miscellaneous itemized deductions (from Form 1041, line 15c) 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 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 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 46.411 25 Adjusted alternative minimum taxable income. Combine lines 1 throb 25 Note: Complete Part II below before going to line 26 26 Income distribution deduction from Part II, line 44 0. 27 Estate tax deduction (from Form 1041, line 19) 28 Add lines 26 and 27 28 income. Subtract line 28 from line 25 46,411. 29 Estate's or trust's share of alternative minimum taxable 29 If line 29 is: • \$24,100 or less, stop here and each -0- on Form 1941, Schedule G, line 1c. The estate or trust isn't liable for the alternative minimum tax. • Over \$24,100, but less than \$176,850,00 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 46,411. 30 Adjusted alternative minimum taxable income (see instructions) 30 31 Adjusted tax-exempt interest (other than amounts included on line 8) 31 32 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 29,506. 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) 34 282,283. 35 Capital gains computed on a minimum tax basis included on line 25 35 36 Capital losses computed on a minimum tax basis included on line 25. Enter as a positive amount 36 0. 37 Distributable net alternative minimum taxable income (DNAMTI). Combine lines 30 through 36. If zero or less, enter -0-37 38 Income required to be distributed currently (from Form 1041, Schedule B, line 9) 38 39 Other amounts paid, credited, or otherwise required to be distributed (from Form 1041, Schedule B, line 10) 39 0. 40 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

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

Sche	dule I (Form 1041) (2017) J.N. PEW JR CHARITABLE TRUST			23-	6299309	Page 2
	TELL Income Distribution Deduction on a Minimum Tax Basis	(conti	nued)			
43	Tentative income distribution deduction on a minimum tax basis. Subtract line 31 from line		·	T		
	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		0.
Pa	rt III Alternative Minimum Tax				,	
45	Exemption amount			45	\$24,100 0	0
46	Enter the amount from line 29	46	46,411.			
47	Phase-out of exemption amount	47	\$80,450 00			
48	Subtract line 47 from line 46. If zero or less, enter -0-	48	0 .			
49	Multiply line 48 by 25% (0.25)			49		
50	Subtract line 49 from line 45. If zero or less, enter -0-			50	24,	100.
51	Subtract line 50 from line 46			51	22,	311.
52	Go to Part IV of Schedule I to figure line 52 if the estate or trust has qualified dividends or h	as a gan	on lines 18a and 19	38		
	of column (2) of Schedule D (Form 1041) (as refigured for the AMT, if necessary). Otherwise	se, 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	3,	455.
53	Alternative minimum foreign tax credit (see instructions)		<b></b>	53		
54	Tentative minimum tax. Subtract line 53 from line 52			54	3,	455. 135.
55	Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Sched	lule G, In	ne 2a).	55	5,	135.
56	Alternative minimum tax. Subtract line 55 from line 54. If zero or less, enter -0 Enter her	e and or				
	Form 1041, Schedule G, line 1c		1 1 1	56	(	0.
Pa	rt IV Line 52 Computation Using Maximum Capital Gains Rat	es 💘				
	Caution: If you didn't complete Part V of Schedule D (Form 1041), the Schedule	Tax Wo	rksneet,	1 1		
	or the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, see the	e jasta	ctions			
	before completing this part					
57	Enter the amount from line 51		•	57	22,	311.
, 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	254,597	· [ ]		
59	Enter the amount from Schedule D (Form 1041), line 18b, column (2)			34		
	(as refigured for the AMT, if necessary). If you didn't complete					
	Schedule D for the regular tax or the AMT, enter -0-	59	26,549	4		
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 and lines 58 auto 59 and enter		-			,
	the smaller of that result or the amount from the 10 of the Schedule D Tax					
	Worksheet (as refigured for the AMT, if agressary)	60	281,146	7—	۵۵	244
61	Enter the smaller of line 57 or line 60			61	22,	311.
62	Subtract line 61 from line 57			62		0.
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	1				
	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	3 554	<b>- </b> \$***		
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	22,311	-	ı	
68	Enter the smaller of line 66 or line 67. This amount is taxed at 0%	68	2,550	4		
69	Subtract line 68 from line 67	69	19,761	· 122 . * 1		

Schedule | (Form 1041) (2017) J.N. PEW JR CHARITABLE TRUST 23-6299309 Page 3 Part IV Line 52 Computation Using Maximum Capital Gains Rates (continued) 70 Maximum amount subject to rates below 20% 70 \$12,500 00 2,550. 71 Enter the amount from line 66 71 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 -0-2,550 73 Add line 71 and line 72 73 .950 74 Subtract line 73 from line 70. If zero or less, enter -0-74 9,950. 75 75 Enter the smaller of line 69 or 74 1,493. 76 Multiply line 75 by 15% (0.15) 12,500 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. 9,811 78 Subtract line 77 from line 67 78 1,962. 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. 80 Add lines 62, 77, and 78 81 81 Subtract line 80 from line 57 82 Multiply line 81 by 25% (0.25) 3,455. 83 83 Add lines 63, 76, 79, and 82 84 If line 57 is \$187,800 or less, multiply line 57 by 26% (0.26). Otherwise, multiply line 57 by 28% £0,28 5,801. and subtract \$3,756 from the result 3,455. Enter the smaller of line 83 or line 84 here and on line 52 Schedule I (Form 1041) (2017)