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STATE OF SOUTH CAROLINA  
DEPARTMENT OF REVENUE  
**FIDUCIARY INCOME TAX RETURN**

**SC1041**  
(Rev. 7/16/19)  
3084

For the calendar year 2019 or Fiscal Taxable Year Beginning and ending **2019**

Name of estate or trust **SAM WALTON ESTATE** FEIN **56-9999999**

Name and title of fiduciary **JUNE BUG** Mailing address **1180 DUTCH FORK ROAD** City **BALLENTINE** State **AR** ZIP **72616** County Code **Out of SC**

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

<b>A. Check all that apply:</b> <input type="checkbox"/> Address change <input checked="" type="checkbox"/> Amended return <input type="checkbox"/> Final return <input type="checkbox"/> Electing small business trust		<b>B. Trusts - check if:</b> <input type="checkbox"/> Simple trust <input type="checkbox"/> Complex trust <input type="checkbox"/> Testamentary <input type="checkbox"/> Inter vivos		<b>C. Check if:</b> <input type="checkbox"/> Resident estate or trust <input checked="" type="checkbox"/> Nonresident estate or trust		<b>D. Was the final distribution of assets been made during the year?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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E. During this taxable year, was this estate or trust notified of any federal change for any prior years? ☐ Yes or ☒ No If yes, attach copy.  
 F. Is a federal Schedule K-1 attached for each beneficiary? ☐ Yes or ☐ No If yes, how many? N/A If no, attach explanation.

**If a nonresident estate or trust with income from both South Carolina and non South Carolina sources, complete and attach Part III, page 3 of SC1041.**

1. Federal Taxable Income (Residents: Federal 1041; Nonresidents: Part III, line 22, column D)	1		00
2. Federal fiduciary exemption included in line 1 above	2		00
3. South Carolina modifications relating to gains allocated to principal or relating to other items not affecting federal distributable net income (attach explanation)	3		00
4. Fiduciary's share of SC fiduciary adjustment (from Part II, line 1i) <input type="checkbox"/> Addition <input type="checkbox"/> Subtraction	4		00
5. Net (add lines 1 through 4) <b>PURSUANT TO: REG. 1.671-4(A), ALL ITEMS</b>	5		00
6. South Carolina fiduciary exemption (see instructions) <b>ATTRIBUTED TO THE GRANTOR</b>	6	<	00
7. South Carolina taxable income (subtract line 6 from line 5) <b>UNDER IRC SEC. 671-678 ARE</b>	7		00
8. South Carolina tax (see instructions for tax computation schedule) <b>REPORTED</b>	8		00
9. Tax on Lump Sum Distribution (SC4972) and/or Active Trade or Business Income (I-335) on attached sch.	9		00
10. Less nonrefundable credits (attach SC1040TC)	10	<	00
11. Add lines 8-10 and enter the results but not less than zero	11		00
12. South Carolina income tax withheld for nonresident beneficiaries (from Part IV)	12		5,730 00
13. Total tax (add lines 11 and 12)	13		5,730 00
14. Amount paid with: (a) Extension } <input type="checkbox"/> 00 (b) SC withholding } <input type="checkbox"/> 00 Enter total	14		00
15. Estimated Tax Payments and Refundable Tax Credit			
(a) Estimated Tax payments	15a		3,500 00
(b) Amount applied from 2018 return	15b		1,260 00
(c) Motor Fuel Income Tax Credit	15c		00
Total (add lines 15a through 15c)	15		4,760 00
16. Total payments (add lines 14 and 15)	16		4,760 00
17. Overpayment (subtract line 13 from line 16)	17		00
18. Late filing and/or late payment: penalties <input type="checkbox"/> 00 interest <input type="checkbox"/> 00 Enter total here	18		00
19. Penalty for underpayment of Estimated Tax (Attach SC2210)	19		00
20. Balance (subtract line 16 from line 13. Add lines 18 and 19, if applicable) Pay in full to SCDOR <b>BALANCE DUE</b>	20		970 00
21. Amount of line 17 to be credited to 2020 Estimated Tax	21		00
22. Net refund (subtract line 21 from line 17 and enter the amount to be refunded) <b>REFUND</b>	22		00

<b>Sign Here</b>	I declare that this return and all attachments are true, correct, and complete to the best of my knowledge and belief.	
	Signature of fiduciary or officer representing fiduciary	Date <b>12/11/19</b>
<b>Paid Preparer's Use Only</b>	Taxpayer's email <b>email@email.com</b>	
	Preparer's printed name	
<b>Paid Preparer's Use Only</b>	I authorize the Director of the SCDOR or delegate to discuss this return, attachments, and related tax matters with the preparer. Yes <input type="checkbox"/> No <input type="checkbox"/>	
	Preparer's signature <b>JEREMIAH GILLET</b>	Date <b>12/11/19</b>
<b>Paid Preparer's Use Only</b>	Check if self-employed <input checked="" type="checkbox"/>	Preparer's phone number <b>800-968-8900</b>
	Firm's name (or yours if self-employed) and address <b>AFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIRMFIA ADDRESSADDRESSADDRESSADDRESSADDRESSADDA ACITYCITYCITYCITYCIA, MI</b>	PTIN or FEIN <b>P12345678</b> ZIP <b>48130-1234</b>

**Part I - SOUTH CAROLINA FIDUCIARY ADJUSTMENT**

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

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

Complete ONLY if Part I indicates a South Carolina fiduciary adjustment. It is allocated among all beneficiaries and the fiduciary in the same ratio as their relative shares of federal distributable net income. Nonresident beneficiaries see parts III and IV for computation of income.

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

**COLUMN 2** - Total federal distributable net income must be equal to the federal 1041, Schedule B, line 7.

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

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

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

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

**TAX WITHHELD FOR NONRESIDENT BENEFICIARIES** (Rev. 7/16/19)

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

The SC41 may be submitted with the SC1041 or separately. If mailing separately, mail to **SCDOR, Taxable Fiduciary, PO Box 125, Columbia, SC 29214-0038.**

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- the beneficiary from whom the tax is withheld so that the beneficiary may attach it to their South Carolina Income Tax return
- the beneficiary for their records
- the fiduciary for their records

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**SC41****1022**

STATE OF SOUTH CAROLINA - INCOME TAX  
**FIDUCIARY REPORT OF NONRESIDENT BENEFICIARY TAX WITHHELD**  
**ENDING DATE OF ESTATE'S OR TRUST'S TAX YEAR**

**20 19**

Nonresident beneficiary's name	SSN	Name of estate or trust	FEIN
	400-00-5101		56-9999999
EMILY WATSON		SAM WALTON ESTATE	
Street Address	County	Nonresident beneficiary's share of distributable income from South Carolina sources	
38387 WEST MAIN ST.			
City	State ZIP	Ordinary income	\$ 20,236.00
MANHATTEN	NY 10002	Long-term capital gain	\$ .00
		Short-term capital gain	\$ .00
		Amount of tax withheld	\$ 1,433.00

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STATE OF SOUTH CAROLINA - INCOME TAX

**SC41** **FIDUCIARY REPORT OF NONRESIDENT BENEFICIARY TAX WITHHELD** **20** 19  
**1022** **ENDING DATE OF ESTATE'S OR TRUST'S TAX YEAR**

Nonresident beneficiary's name	SSN	Name of estate or trust	FEIN
JACOB WATSON	400-00-5102	SAM WALTON ESTATE	56-9999999
Street Address	County	Nonresident beneficiary's share of distributable income from South Carolina sources	
1222 MAIN		Ordinary income ..... \$ 20,236.00	
City	State ZIP	Long-term capital gain ..... \$ .00	
MAI	CO 52121	Short-term capital gain ..... \$ .00	
		Amount of tax withheld ..... \$ 1,433.00	

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Nonresident beneficiary's name  <u>MAGGIE WALTON</u>	SSN <u>400-00-5103</u>	Name of estate or trust  <u>SAM WALTON ESTATE</u>	FEIN <u>56-9999999</u>								
Street Address  <u>9901 LOVEJOY</u>	County  <u>MI</u>	Nonresident beneficiary's share of distributable income from South Carolina sources  <table style="width: 100%;"><tr><td>Ordinary income .....</td><td style="text-align: right;">\$ <u>20,236.00</u></td></tr><tr><td>Long-term capital gain .....</td><td style="text-align: right;">\$ <u>.00</u></td></tr><tr><td>Short-term capital gain .....</td><td style="text-align: right;">\$ <u>.00</u></td></tr><tr><td>Amount of tax withheld .....</td><td style="text-align: right;">\$ <u>1,432.00</u></td></tr></table>		Ordinary income .....	\$ <u>20,236.00</u>	Long-term capital gain .....	\$ <u>.00</u>	Short-term capital gain .....	\$ <u>.00</u>	Amount of tax withheld .....	\$ <u>1,432.00</u>
Ordinary income .....	\$ <u>20,236.00</u>										
Long-term capital gain .....	\$ <u>.00</u>										
Short-term capital gain .....	\$ <u>.00</u>										
Amount of tax withheld .....	\$ <u>1,432.00</u>										
City  <u>BYRON</u>	State ZIP  <u>48418</u>										

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City  <u>BYRON</u>	State ZIP  <u>48418</u>										

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STATE OF SOUTH CAROLINA - INCOME TAX

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	400-00-5104		56-9999999
IKE WALTON		SAM WALTON ESTATE	
Street Address	County	Nonresident beneficiary's share of distributable income from South Carolina sources	
3242 DEXTER AVE		Ordinary income ..... \$ 20,236.00	
City	State ZIP	Long-term capital gain ..... \$ .00	
DEXTER	MI 47108	Short-term capital gain ..... \$ .00	
		Amount of tax withheld ..... \$ 1,432.00	

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GRANTOR 1

## South Carolina Grantor / Agency Report

Form **SC1041****2019**

For calendar year 2019, or tax year beginning , and ending

Name of trust

☒ Amended☐ Final

SAM WALTON ESTATE

Grantor's identifying number ▶ 400-00-5101

Trust's EIN ▶ 56-9999999

Grantor's name, address, and ZIP code

Fiduciary's name, address, and ZIP code

EMILY WATSON  
38387 WEST MAIN ST.  
MANHATTEN NY 10002

SAM WALTON ESTATE  
1180 DUTCH FORK ROAD  
BALLENTINE AR 72616

Enter the following items on the South Carolina income tax return of the above named individual.

**Additions:**

Other states' obligations:

Interest / dividends .....

Expenses .....

Income taxes deducted on federal Form 1041 ..... 1,190

Federal net operating loss carryover .....

Out of state losses .....

Federal estate tax .....

Bonus depreciation adjustment .....

Other additions ..... 1,324

**Subtractions:**

U.S. obligations:

Income .....

Expenses .....

State income tax refunds .....

Out of state income .....

South Carolina net operating loss carryover .....

South Carolina estate tax .....

Bonus depreciation adjustment .....

Other subtractions ..... 1,103

**Source Income:**

Interest ..... 20,236

Dividends ..... 20,236

Business ..... 20,236

Short-term capital gain .....

Long-term capital gain .....

Rents / royalties / partnerships / estates .....

Farm .....

Ordinary gains .....

Other .....

Expenses ..... 1,433

Nonresident withholding ..... 1,433

**Credits:****Additional Information:**

## South Carolina Grantor / Agency Report

Form **SC1041****2019**

For calendar year 2019, or tax year beginning , and ending

Name of trust

☒ Amended

SAM WALTON ESTATE

☐ Final

Grantor's identifying number ▶ 400-00-5102

Trust's EIN ▶ 56-9999999

Grantor's name, address, and ZIP code

Fiduciary's name, address, and ZIP code

JACOB WATSON  
1222 MAIN  
MAI

CO 52121

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Bonus depreciation adjustment .....

Other subtractions ..... 1,103

**Source Income:**Interest .....  
Dividends .....  
Business ..... 20,236

Short-term capital gain .....

Long-term capital gain .....

Rents / royalties / partnerships / estates .....

Farm .....

Ordinary gains .....

Other .....

Expenses .....

Nonresident withholding ..... 1,433

**Credits:****Additional Information:**



## South Carolina Grantor / Agency Report

Form **SC1041****2019**

For calendar year 2019, or tax year beginning , and ending

Name of trust

☒ Amended

SAM WALTON ESTATE

☐ Final

Grantor's identifying number ▶ 400-00-5103

Trust's EIN ▶ 56-9999999

Grantor's name, address, and ZIP code

Fiduciary's name, address, and ZIP code

MAGGIE WALTON  
9901 LOVEJOY  
BYRON MI 48418SAM WALTON ESTATE  
1180 DUTCH FORK ROAD  
BALLENTINE AR 72616

Enter the following items on the South Carolina income tax return of the above named individual.

**Additions:**

Other states' obligations:

Interest / dividends .....

Expenses .....

Income taxes deducted on federal Form 1041 ..... 1,190

Federal net operating loss carryover .....

Out of state losses .....

Federal estate tax .....

Bonus depreciation adjustment .....

Other additions ..... 1,324

**Subtractions:**

U.S. obligations:

Income .....

Expenses .....

State income tax refunds .....

Out of state income .....

South Carolina net operating loss carryover .....

South Carolina estate tax .....

Bonus depreciation adjustment .....

Other subtractions ..... 1,102

**Source Income:**

Interest ..... 20,236

Dividends ..... 20,236

Business ..... 20,236

Short-term capital gain .....

Long-term capital gain .....

Rents / royalties / partnerships / estates .....

Farm .....

Ordinary gains .....

Other .....

Expenses ..... 1,432

Nonresident withholding ..... 1,432

**Credits:****Additional Information:**

## South Carolina Grantor / Agency Report

Form **SC1041****2019**

For calendar year 2019, or tax year beginning , and ending

Name of trust

☒ Amended

SAM WALTON ESTATE

☐ Final

Grantor's identifying number ▶ 400-00-5104

Trust's EIN ▶ 56-9999999

Grantor's name, address, and ZIP code

Fiduciary's name, address, and ZIP code

IKE WALTON  
3242 DEXTER AVE  
DEXTER MI 47108SAM WALTON ESTATE  
1180 DUTCH FORK ROAD  
BALLENTINE AR 72616

Enter the following items on the South Carolina income tax return of the above named individual.

**Additions:**

Other states' obligations:

Interest / dividends .....  
Expenses .....

Income taxes deducted on federal Form 1041 ..... 1,190

Federal net operating loss carryover .....

Out of state losses .....

Federal estate tax .....

Bonus depreciation adjustment .....

Other additions ..... 1,324

**Subtractions:**

U.S. obligations:

Income .....  
Expenses .....

State income tax refunds .....

Out of state income .....

South Carolina net operating loss carryover .....

South Carolina estate tax .....

Bonus depreciation adjustment .....

Other subtractions ..... 1,103

**Source Income:**Interest .....  
Dividends .....  
Business ..... 20,236

Short-term capital gain .....

Long-term capital gain .....

Rents / royalties / partnerships / estates .....

Farm .....

Ordinary gains .....

Other .....

Expenses .....

Nonresident withholding ..... 1,432

**Credits:****Additional Information:**

Form <b>1041</b>		<b>South Carolina Financial Transaction Record</b>		<b>2019</b>	
		For calendar year 2019, or tax year beginning , and ending			
Name			Employer Identification Number		
SAM WALTON ESTATE			56-9999999		

**Electronic Funds Withdrawal or Direct Deposit**

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

Electronic Funds Withdrawal (Direct Debit)	<input checked="checked" type="checkbox"/>
Direct Deposit of Refund	<input type="checkbox"/>
Routing Transit Number	041000124
Bank Account Number	554123691
Type of Account	SAVINGS
Taxpayer Phone Number	
Requested Payment Date	04/15/20
Amount of Tax Payment	970
Refund to be Deposited	

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