

Please print or type your name, mailing address, agency name, and position below:

OF FINANCIAL INTERESTS

FOR OFFICE USE ONLY:

LAST NAME — FIRST NAME — MIDDLE NAME:

STAVER BRIAN

MAILING ADDRESS:

32896 ESTATE GARDEN DR.

CITY:

Wesley Chapel

ZIP:

33545

COUNTY:

Pasco

NAME OF AGENCY:

NAME OF OFFICE OR POSITION HELD OR SOUGHT:

CANDIDATE Pasco County School Board

CHECK IF THIS IS A FILING BY A CANDIDATE

BRIAN E. CORLEY
SUPERVISOR OF ELECTIONS
DADE CITY, FLORIDA

2018 JUN 18 PM 12:35

RECEIVED

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2017 or a more current date. [Note: Net worth is not calculated by subtracting your reported liabilities from your reported assets, so please see the instructions on page 3.]

My net worth as of June 4, 2018 was \$ 4,173,000.00

PART B -- ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effects (described above) is \$ see attached

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
SEE ATTACHMENTS	

PART C -- LIABILITIES

LIABILITIES IN EXCESS OF \$1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
SEE ATTACHMENTS	

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
See Attachments	

PART D -- INCOME

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2017 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

I elect to file a copy of my 2017 federal income tax return and all W2's, schedules, and attachments.
 [If you check this box and attach a copy of your 2017 tax return, you need not complete the remainder of Part D.]

PRIMARY SOURCES OF INCOME (See instructions on page 5):

NAME OF SOURCE OF INCOME EXCEEDING \$1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT
SEE ATTACHMENTS		

SECONDARY SOURCES OF INCOME [Major customers, clients, etc., of businesses owned by reporting person--see instructions on page 5]:

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE
N/A	N/A	N/A	N/A

PART E -- INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY	N/A		
ADDRESS OF BUSINESS ENTITY			
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
DO I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

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 2018 JUN 18 PM 12:15
 BRIANNE CORLEY
 SUPERVISOR OF ELECTIONS
 DADE COUNTY, FLORIDA

PART F - TRAINING

For officers required to complete annual ethics training pursuant to section 112.3142, F.S.

I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.

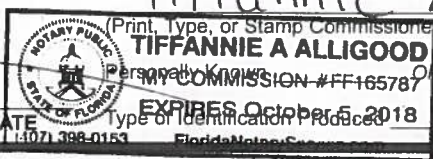
OATH

STATE OF FLORIDA
 COUNTY OF Pasco

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

Sworn to (or affirmed) and subscribed before me this 6th day of June, 2018 by Brian S. Staver

(Signature of Notary Public--State of Florida)
Tiffannie A. Alligood



Brian S. Staver
 SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

(Print, Type, or Stamp Commission) Name of Notary Public
TIFFANNIE A ALLIGOOD
 Personally Known OR Produced Identification

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, _____, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Signature

Date

Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.

IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE

THE FARMER & ALLIANCE
WAY COMPANY RETIRED
EXPIRES 06/30/2018



Positions for account Demetrius XXXX-1630 as of 03:38 PM ET, 05/27/2018

Symbol	Description	Market Value
ABT	ABBOTT LABS	\$24,948.00
ABBV	ABBVIE INC DUTCH TENDER EXP	\$15,162.00
AAPL	APPLE INC	\$75,432.00
AMAT	APPLIED MATLS INC IAM CO	\$43,222.50
BA	BOEING CO IAM COMMERCIAL	\$63,015.75
C	CITIGROUP INC	\$34,220.00
CVA	COVANTA HOLDING CORP	\$12,600.00
FCX	FREEMPORT MCMORAN INC	\$13,664.00
GS	GOLDMAN SACHS GROUP	\$17,625.75
GWPH	GW PHARMACEUTICALS PLC	\$24,165.00
HPQ	HP INC	\$15,337.00
INTC	INTEL CORP	\$33,264.00
IP	INTERNTNL PAPER CO	\$16,239.00
JNJ	JOHNSON & JOHNSON	\$12,147.00
JPM	JPMORGAN CHASE & CO	\$33,198.00
MSFT	MICROSOFT CORP DISCOUNT	\$29,508.00
NWL	NEWELL BRANDS INC	\$12,630.00
NVDA	NVIDIA CORP	\$87,248.00
PEP	PEPSIAMERICAS INC	\$10,231.62
PFE	PFIZER INC	\$17,840.00
CRM	SALESFORCE COMMON INC	\$51,184.00
SCHW	SCHWAB CHARLES CORP NEW	\$28,650.00
HON	TETRA TECH INC	\$30,132.00
UTX	UNITED TECHNOLOGIES CORP	\$25,406.00
V	VISA INC CLASS A	\$13,128.00
PPA	POWERSHARES AEROSPACE & NAME CHANGE	\$22,948.00
QQQ	POWERSHARES QQQ TRUST SRS 1 ETF	\$42,430.00
XLF	SELECT STR FINANCIAL SELECT SPDR ETF	\$27,850.00
XLK	TECHNOLOGY SELECT SECTOR SPDR ETF	\$27,900.00
ALLY FINL INC		\$20,050.00
DISH DBS CORP		\$23,468.75
FIAT CHRYSLER A		\$25,406.25
GENERAL MTRS FIN		\$24,316.43
GOODYEAR TIRE		\$74,250.00
HUNTSMAN INTERN		\$35,700.00
ICAHN ENTERPRISE		\$51,125.00
KB HOME		\$30,000.00
LENNAR CORP		\$25,218.75
PINNACLE FOODS		\$46,237.50
SBA COMMUNICATI		\$24,750.00
STEEL DYNAMICS		\$35,568.75
SYMANTEC CORP		\$19,979.96
T-MOBILE USA INC		\$51,750.00
U S WEST CAPITAL		\$35,537.60
Cash & Money Market		\$98,064.38
Account Total		\$1,482,748.99

BRIAN E. CORLEY
SUPERVISOR OF ELECTIONS
DADE CITY, FLORIDA

2018 JUN 18 PM 12:35

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Positions for account Rollover IRA XXXX-6825 as of 04:00 PM ET, 05/27/2018

Symbol	Description	Market Value
AMLP	ALPS ALERIAN MLP ETF	\$4,048.00
QQQ	POWERSHARES QQQ TRUST SRS 1 ETF	\$33,944.00
XLV	SELECT SECTOR HEALTH CARE SPDR ETF	\$14,514.50
XLI	SELECT SECTOR INDUSTRIAL SPDR ETF	\$37,845.00
XLB	SPDR FUND MATERIALS SELECT SECTR ETF	\$11,802.00
75886AAK4	REGENCY ENERGY P 5.75%20 DUE 09/01/20	\$10,422.00
780097AM3	ROYAL BANK SCOTL 4.7%18F DUE 07/03/18	\$10,012.45
988498AF8	YUM BRANDS INC 5.3%19 DUE 09/15/19	\$15,356.25
Cash & Money Market		\$11,717.46
Account Total		\$149,661.66

Positions for account Joint Tenant 03:07 PM ET, 05/27/2018

Symbol	Description	Market Value	My Share
ABBV	ABBVIE INC DUTCH TENDER	\$10,108.00	\$5,054.00
EBAY	EBAY INC	\$30,086.42	\$15,043.21
HPQ	HP INC	\$4,382.00	\$2,191.00
INTC	INTEL CORP	\$5,544.00	\$2,772.00
PYPL	PAYPAL HOLDINGS INC	\$64,201.28	\$32,100.64
PFE	PFIZER INC	\$7,136.00	\$3,568.00
VZ	VERIZON COMMUNICATN	\$7,278.00	\$3,639.00
Cash & Money Market		\$21,961.02	\$10,980.51
Account Total	--	\$150,696.72	\$75,348.36

Assets:	Reportable	Comments
Real Estate		
32896 Estate Garden Dr. Wesley Chapel, FL	294,000.00	
9261 Congress St. New Market, VA	42,500.00	
Automobiles		
2018 Toyota Hylander	22,500.00	
2010 Ford Mustang	8,500.00	
Household goods		
Tools, TV's, Computer's, Furniture	12,500.00	
Stocks and Bonds		Address
Ira rollover	149,661.00	P.O. Box 982605 El Paso, TX. 79998-2605
Charles Schwab	741,374.00	P.O. Box 982605 El Paso, TX. 79998-2605
Bank Account		
Charles Schwab	37,674.00	P.O. Box 982605 El Paso, TX. 79998-2605

Total of Assets - 1,308,709.00

Liabilities:	Reportable	Address
2018 Toyota Hylander	16,000.00	P.O. Box 991817 Mobile, AL. 36691-8817
Quicken Loans - 32896 Estate Garden Dr.	119,500.00	P.O. Box 6577 Carol Stream, IL. 60197-6577

Total of Liabilities - 135,500.00

Net Worth - \$ 1,173,209.00

Assets: **Brian/Sherri** **Reportable** **Comments**

Assets:	Brian/Sherri	Reportable	Comments
Real Estate			
32896 Estate Garden Dr. Wesley Chapel, FL	588,000.00	294,000.00	
9261 Congress St. New Market, VA	85,000.00	42,500.00	
Automobiles			
2018 Toyota Hylander	45,000.00	22,500.00	
2010 Ford Mustang	8,500.00	8,500.00	
Household goods			
Tools, TV's, Computer's, Furniture	25,000.00	12,500.00	
Stocks and Bonds			Address
Ira rollover	149,661.00	149,661.00	P.O. Box 982605 El Paso, TX. 79998-2605
Charles Schwab	1,482,748.00	741,374.00	P.O. Box 982605 El Paso, TX. 79998-2605
Bank Account			
Charles Schwab	75,348.00	37,674.00	P.O. Box 982605 El Paso, TX. 79998-2605

Total of Assets - 2,459,257.00 1,308,709.00

Liabilities:

Liabilities:	Brian/Sherri	Reportable	Address
2018 Toyota Hylander	32,000.00	16,000.00	P.O. Box 991817 Mobile, AL. 36691-8817
Quicken Loans - 32896 Estate Garden Dr.	239,000.00	119,500.00	P.O. Box 6577 Carol Stream, IL. 60197-6577

Total of Liabilities - 271,000.00 135,500.00

Net Worth - \$ 2,188,257.00 \$ 1,173,209.00

TAX RETURN

Two-Year Comparison Worksheet

2017

Name(s) as shown on return

BRIAN S. & SHERRI JO STAVER

Social security number

2016 Filing Status **MARRIED FILING JOINT**

2017 Filing Status **MARRIED FILING JOINT**

2016 Tax Bracket **15.0%**

2017 Tax Bracket **15.0%**

Description	Tax Year 2016	Tax Year 2017	Increase (Decrease)
WAGES, SALARIES, AND TIPS	39,744.	28,007.	-11,737.
SCHEDULE B - TAXABLE INTEREST	38,199.	29,214.	-8,985.
SCHEDULE B - ORDINARY DIVIDENDS	12,895.	15,747.	2,852.
SCHEDULE B - QUALIFIED DIVIDENDS	12,795.	15,223.	2,428.
SCHEDULE D (CAPITAL GAIN/LOSS)	24,671.	-3,000.	-27,671.
FORM 4797 (OTHER GAINS OR LOSSES)	29.	1,124.	1,095.
SCHEDULE E (RENTAL AND PASSTHROUGH)	-1,019.	-9,682.	-8,663.
OTHER INCOME	0.	4.	4.
TOTAL INCOME	114,519.	61,414.	-53,105.
DOMESTIC PROD. ACTIVITIES DEDUCTION	0.	2.	2.
TOTAL ADJUSTMENTS	0.	2.	2.
ADJUSTED GROSS INCOME	114,519.	61,412.	-53,107.
TAXES	35,789.	10,253.	-25,536.
INTEREST (DEDUCTIBLE)	7,023.	7,449.	426.
CONTRIBUTIONS	2.	204.	202.
JOB EXPENSES AND 2% MISC. DEDUCT.	13,366.	14,663.	1,297.
TOTAL ITEMIZED DEDUCTIONS	56,180.	32,569.	-23,611.
INCOME BEFORE EXEMPTIONS	58,339.	28,843.	-29,496.
PERSONAL EXEMPTIONS	8,100.	8,100.	
TAXABLE INCOME	50,239.	20,743.	-29,496.
TAX	1,278.	553.	-725.
TAX BEFORE CREDITS	1,278.	553.	-725.
FORM 1116 (FOREIGN TAX CREDIT)	126.	0.	-126.
FORM 8880 (RETIREMENT SAVINGS CR.)	0.	75.	75.
FORM 8801 (PRIOR YEAR MIN. TAX CR.)	8.	0.	-8.
TAX AFTER NON-REFUNDABLE CREDITS	1,144.	478.	-666.
TOTAL TAX	1,144.	478.	-666.
FEDERAL INCOME TAX WITHHELD	6,378.	4,449.	-1,929.
TOTAL PAYMENTS	6,378.	4,449.	-1,929.
TAX OVERPAID	5,234.	3,971.	-1,263.
AMOUNT REFUNDED	5,234.	3,971.	-1,263.

IRS e-file Signature Authorization

▶ Return completed Form 8879 to your ERO. (Do not send to IRS.)
 ▶ Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) ▶

Taxpayer's name BRIAN S. STAVER		Social security number ██████████ 7218
Spouse's name SHERRI JO STAVER		Spouse's social security number ██████████ 1748

Part I Tax Return Information - Tax Year Ending December 31, 2017 (Whole dollars only)		
1 Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4; Form 1040NR, line 37)	1	61,412.
2 Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12; Form 1040NR, line 61)	2	478.
3 Federal income tax withheld from Forms W-2 and 1099 (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7; Form 1040NR, line 62a)	3	4,449.
4 Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a; Form 1040NR, line 73a)	4	3,971.
5 Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14; Form 1040NR, line 75)	5	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2017, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize MARCUM LLP to enter or generate my PIN 0 1 0 2 3
 as my signature on my tax year 2017 electronically filed income tax return. Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ CLIENT'S COPY Date ▶ _____

Spouse's PIN: check one box only

I authorize MARCUM LLP to enter or generate my PIN 0 2 4 0 5
 as my signature on my tax year 2017 electronically filed income tax return. Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on my tax year 2017 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ _____ Date ▶ _____

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 7 7 6 6 6 4 9 5 1 1 3
 Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2017 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶ [Signature] Date ▶ 5/18/18

719995 11-10-17 **ERO Must Retain This Form - See Instructions**
Don't Submit This Form to the IRS Unless Requested To Do So

[REDACTED]

[REDACTED]

**Tax Year 2017 e-file Jurat/Disclosure
for Form 1040, 1040A, 1040EZ, or 1040NR
using Practitioner PIN method
(with or without Electronic Funds Withdrawal)**

ERO Declaration

I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer. If the furnished return was signed by a paid preparer, I declare I have entered the paid preparer's identifying information in the appropriate portion of this electronic return. If I am the paid preparer, under the penalties of perjury I declare that I have examined this electronic return, and to the best of my knowledge and belief, it is true, correct, and complete. This declaration is based on all information of which I have any knowledge.

ERO Signature

I am signing this Tax Return by entering my PIN below.

ERO's PIN 77666495113
(enter EFIN plus 5 self-selected numerics)

**Taxpayer Declarations
Perjury Statement**

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Consent to Disclosure

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return/form to IRS and to receive the following information from IRS: a) an acknowledgment of receipt or reason for rejection of transmission; b) the reason for any delay in processing or refund; and, c) the date of any refund.

I am signing this Tax Return and Electronic Funds Withdrawal Consent, if applicable, by entering my Self-Select PIN below.

Taxpayer's PIN: 01023 Date 05182018

Spouse's PIN: 02405

CLIENT'S COPY

718711 06-15-17

▼ DETACH HERE ▼

Form **4868**
Department of the Treasury
Internal Revenue Service (99)

**Application for Automatic Extension of Time
To File U.S. Individual Income Tax Return**

1019

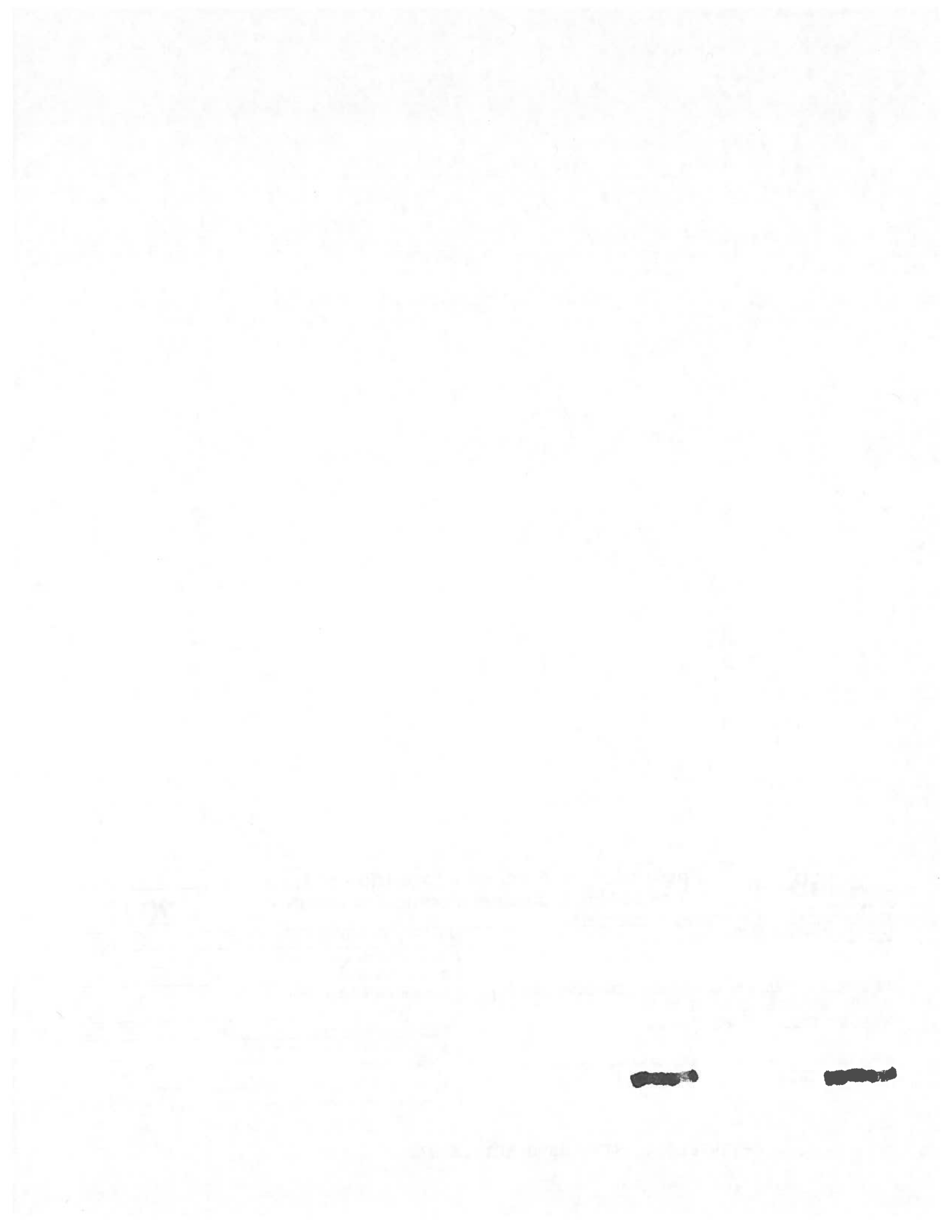
For calendar year 2017, or other tax year beginning

2017, ending

2017

Part I Identification		Part II Individual Income Tax	
<p>1 Your name(s)</p> <p>BRIAN S. STAVER & SHERRI JO STAVER 32896 ESTATE GARDEN DR. WESLEY CHAPEL, FL 33545</p>		<p>4 Estimate of total tax liability for 2017 \$ <u>0.</u></p> <p>5 Total 2017 payments <u>0.</u></p> <p>6 Balance due. Subtract line 5 from line 4 <u>0.</u></p> <p>7 Amount you are paying <u>0.</u></p>	
<p>2 Your social security number</p> <p><u>██████████</u> 7218</p>	<p>3 Spouse's social security number</p> <p><u>██████████</u> 1748</p>	<p>8 Check here if you are "out of the country" and a U.S. citizen or resident <input type="checkbox"/></p> <p>9 Check here if you file Form 1040NR or 1040NR-EZ and did not receive wages as an employee subject to U.S. income tax withholding <input type="checkbox"/></p>	

229947218 AL STAV 30 0 201712 670



For the year Jan. 1-Dec. 31, 2017, or other tax year beginning

2017, ending

20

See separate instructions.

Your first name and initial

Last name

BRIAN S.

STAVER

Your social security number

7218

If a joint return, spouse's first name and initial

Last name

SHERRI JO

STAVER

Spouse's social security number

1748

Home address (number and street). If you have a P.O. box, see instructions.

32896 ESTATE GARDEN DR.

Apt. no.

Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below.

WESLEY CHAPEL, FL 33545

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name

Foreign province/state/county

Foreign postal code

You Spouse

Filing Status

1 Single

2 Married filing jointly (even if only one had income)

3 Married filing separately. Enter spouse's SSN above and full name here.

4 Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here.

5 Qualifying widow(er) (see instructions)

Check only one box.

Exemptions

6a Yourself. If someone can claim you as a dependent, do not check box 6a

b Spouse

c Dependents:

(1) First name

Last name

(2) Dependent's social security number

(3) Dependent's relationship to you

(4) If child under age 17 qualifying for child tax credit

If more than four dependents, see instructions and check here

Boxes checked on 6a and 6b 2

No. of children on 6c who

lived with you did not live with you due to divorce or separation (see instructions)

Dependents on 6c not entered above

Add numbers on lines above 2

d Total number of exemptions claimed

Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2

STMT 3

28,007.

8a Taxable interest. Attach Schedule B if required

29,214.

b Tax-exempt interest. Do not include on line 8a

8b

9a Ordinary dividends. Attach Schedule B if required

15,747.

b Qualified dividends

9b

15,223.

10 Taxable refunds, credits, or offsets of state and local income taxes

11 Alimony received

12 Business income or (loss). Attach Schedule C or C-EZ

13 Capital gain or (loss). Attach Schedule D if required. If not required, check here

-3,000.

14 Other gains or (losses). Attach Form 4797

1,124.

15a IRA distributions

15a

b Taxable amount

16a Pensions and annuities

16a

756.

b Taxable amount

0.

17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

-9,682.

18 Farm income or (loss). Attach Schedule F

19 Unemployment compensation

20a Social security benefits

20a

b Taxable amount

21 Other income. List type and amount

SEE STATEMENT 1

4.

22 Combine the amounts in the far right column for lines 7 through 21. This is your total income

61,414.

Adjusted Gross Income

23 Educator expenses

23

24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ

24

25 Health savings account deduction. Attach Form 8889

25

26 Moving expenses. Attach Form 3903

26

27 Deductible part of self-employment tax. Attach Schedule SE

27

28 Self-employed SEP, SIMPLE, and qualified plans

28

29 Self-employed health insurance deduction

29

30 Penalty on early withdrawal of savings

30

31a Alimony paid b Recipient's SSN

31a

32 IRA deduction

32

33 Student loan interest deduction

33

34 Tuition and fees. Attach Form 8917

34

35 Domestic production activities deduction. Attach Form 8903

35

2.

36 Add lines 23 through 35

2.

710001 02-22-18

37 Subtract line 36 from line 22. This is your adjusted gross income

61,412.

██████████

██████████

Tax and Credits

Standard Deduction for - People who check any box on line 39a or 39b of who can be claimed as a dependent, see instructions.

All others: Single or Married filing separately, \$6,350 Married filing jointly or Qualifying widow(er), \$12,700 Head of household, \$9,350

Table with 3 columns: Line number, Description, and Amount. Includes lines 38-56 with amounts like 61,412, 32,569, 28,843, 8,100, 20,743, 553, 553, 75, 478.

Other Taxes

Table with 3 columns: Line number, Description, and Amount. Includes lines 57-63 with amounts like 478, 478.

Payments

If you have a qualifying child, attach Schedule EIC.

Table with 3 columns: Line number, Description, and Amount. Includes lines 64-74 with amounts like 4,449, 4,449.

Refund

Direct deposit? See instructions.

Table with 3 columns: Line number, Description, and Amount. Includes lines 75-77 with amounts like 3,971, 3,971.

Amount You Owe

Table with 3 columns: Line number, Description, and Amount. Includes lines 78-79.

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? [X] Yes. Complete below. [] No. Designee's name: GEORGE UCCELLI, Phone no: (669) 232-9500, Personal identification number (PIN): 95113

Sign Here

Joint return? See instructions. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge. Signatures and dates for George Uccelli and Spouse.

Paid Preparer Use Only

Print/Type preparer's name: GEORGE UCCELLI, Preparer's signature: GEORGE UCCELLI, Date: 5/18/18, Check self-employed: [] PTIN: P00282278, Firm's name: MARCUM LLP, Firm's EIN: 11-1986323, Firm's address: 111 WEST SAINT JOHN STREET SUITE 1010 SAN JOSE, CA 95113, Phone no: (669) 232-9500

[REDACTED]

Underpayment of Estimated Tax by Individuals, Estates, and Trusts

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Go to www.irs.gov/Form2210 for instructions and the latest information.

▶ Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

2017
Attachment
Sequence No. **06**

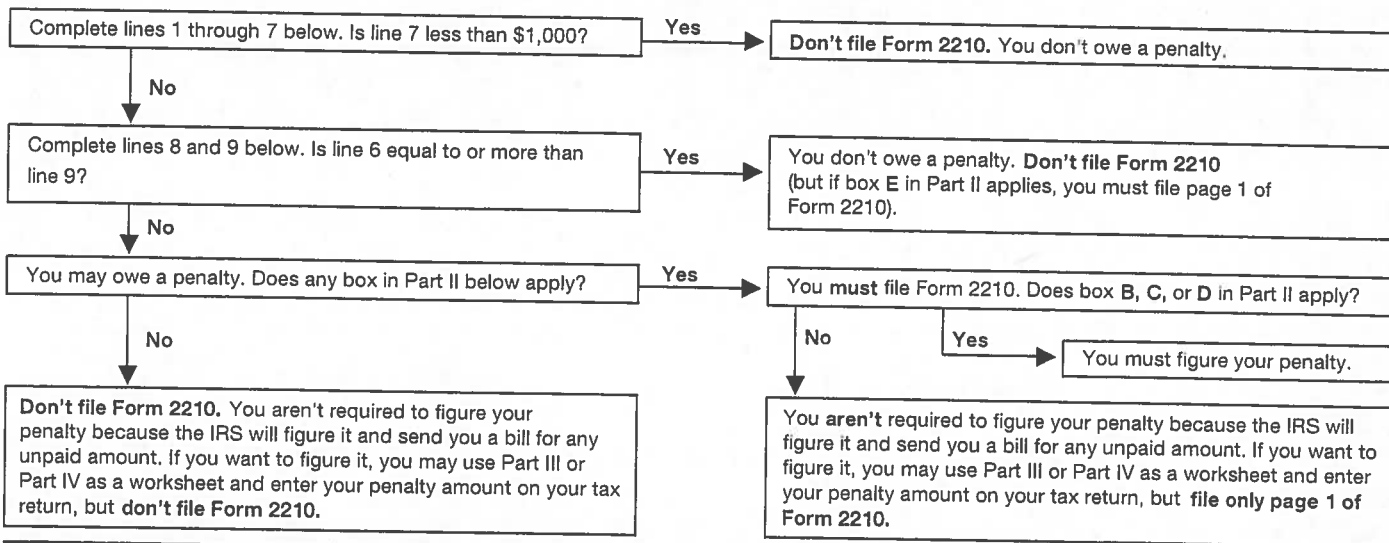
Name(s) shown on tax return

BRIAN S. & SHERRI JO STAVER

Identifying number

7218

Do You Have To File Form 2210?



Part I Required Annual Payment

1	Enter your 2017 tax after credits from Form 1040, line 56 (see instructions if not filing Form 1040)	1	478.
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	
3	Refundable credits, including the premium tax credit (see instructions)	3	()
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop; you don't owe a penalty. Don't file Form 2210	4	478.
5	Multiply line 4 by 90% (0.90)	5	430.
6	Withholding taxes. Don't include estimated tax payments (see instructions)	6	4,449.
7	Subtract line 6 from line 4. If less than \$1,000, stop; you don't owe a penalty. Don't file Form 2210	7	0.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	
9	Required annual payment. Enter the smaller of line 5 or line 8	9	

Next: Is line 9 more than line 6?

- No. You don't owe a penalty. Don't file Form 2210 unless box E below applies.
- Yes. You may owe a penalty, but don't file Form 2210 unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
 - If box A or E applies (but not B, C, or D) file only page 1 of Form 2210. You aren't required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or IV as a worksheet and enter your penalty on your tax return, but file only page 1 of Form 2210.

Part II Reasons for Filing. Check applicable boxes. If none apply, don't file Form 2210.

- A You request a waiver (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you aren't required to figure your penalty.
- B You request a waiver (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C Your income varied during the year and your penalty is reduced or eliminated when figured using the annualized income installment method. You must figure the penalty using Schedule AI and file Form 2210.
- D Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E You filed or are filing a joint return for either 2016 or 2017, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you aren't required to figure your penalty (unless box B, C, or D applies).

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 2210 (2017)



**SCHEDULE A
(Form 1040)**

Itemized Deductions

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service (99)

▶ Go to www.irs.gov/ScheduleA for instructions and the latest information.
▶ Attach to Form 1040.

2017
Attachment
Sequence No. **07**

Name(s) shown on Form 1040

Caution: If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 28.

Your social security number

BRIAN S. & SHERRI JO STAVER

██████████-██████████-7218

Medical and Dental Expenses	Caution: Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1	██████████	
	2	Enter amount from Form 1040, line 38	2	██████████	
	3	Multiply line 2 by 7.5% (0.075)	3	██████████	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	██████████		
Taxes You Paid	5 State and local (check only one box):		5	908.	
	a	<input type="checkbox"/> Income taxes, or	SEE STATEMENT 10		
	b	<input checked="" type="checkbox"/> General sales taxes	6	9,233.	
	6	Real estate taxes (see instructions)	7	112.	
	7	Personal property taxes	8	██████████	
	8	Other taxes. List type and amount ▶	9	10,253.	
	9	Add lines 5 through 8	10	7,306.	
	Interest You Paid	10	Home mortgage interest and points reported to you on Form 1098	11	██████████
		11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ▶	12	██████████
12		Points not reported to you on Form 1098. See instructions for special rules	13	██████████	
13		Mortgage insurance premiums (see instructions)	14	143.	
14		Investment interest. Attach Form 4952 if required. See instructions	15	7,449.	
15		Add lines 10 through 14	16	204.	
16		Gifts by cash or check. If you made any gift of \$250 or more, see instructions	17	██████████	
Gifts to Charity	17	Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	18	██████████	
	18	Carryover from prior year	19	204.	
	19	Add lines 16 through 18	20	██████████	
Casualty and Theft Losses	20	Casualty or theft loss(es) other than net qualified disaster losses. Attach Form 4684 and enter the amount from line 18 of that form. See instructions	21	██████████	
	21	Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. See instructions. ▶	22	██████████	
Job Expenses and Certain Miscellaneous Deductions	22	Tax preparation fees	23	15,891.	
	23	Other expenses - investment, safe deposit box, etc. List type and amount ▶ SEE STATEMENT 6	24	15,891.	
	24	Add lines 21 through 23	25	61,412.	
	25	Enter amount from Form 1040, line 38	26	1,228.	
	26	Multiply line 25 by 2% (0.02)	27	14,663.	
	27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	28	██████████	
Other Miscellaneous Deductions	28	Other - from list in instructions. List type and amount ▶	29	32,569.	
	29	Is Form 1040, line 38, over \$156,900? <input checked="" type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	30	██████████	
Total Itemized Deductions	30	If you elect to itemize deductions even though they are less than your standard deduction, check here		██████████	



2017 04 01

SCHEDULE B
(Form 1040A or 1040)

Interest and Ordinary Dividends

OMB No. 1545-0074

2017
Attachment
Sequence No. **08**

Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on return

▶ Attach to Form 1040A or 1040.
▶ Go to www.irs.gov/ScheduleB for instructions and the latest information.

Your social security number

BRIAN S. & SHERRI JO STAVER

██████████ 7218

Part I

Interest

1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address ▶

CEFCU
STAR ONE CREDIT UNION
CHARLES SCHWAB & CO., INC 1630
CHARLES SCHWAB & CO., INC -1630 (ACCRUED INTEREST)
CHARLES SCHWAB & CO., INC -4952
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.
FROM K-1 - ENTERPRISE PRODUCTS PARTNERS, L.P.
FROM K-1 - ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)
FROM K-1 - WILLIAMS PARTNERS, LP
FROM K-1 - KKR & CO LP

		Amount
		10.
		46.
		30,927.
		-2,039.
1		5,542.
		32.
		3.
		1.
		3.
		132.
		34,657.
	ABP ADJUSTMENT SEE STATEMENT 12	-5,443.
2		29,214.
3		
4		29,214.

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

2 Add the amounts on line 1
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815
4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶

Note: If line 4 is over \$1,500, you must complete Part III.

Part II

Ordinary Dividends

5 List name of payer ▶
CISCO SYSTEMS
CHARLES SCHWAB & CO., INC 1630
CHARLES SCHWAB & CO., INC -4952
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.
FROM K-1 - KKR & CO LP

		Amount
		226.
		13,288.
		1,965.
		34.
		234.
5		
6		15,747.

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶

Note: If line 6 is over \$1,500, you must complete Part III.

Part III

Foreign Accounts and Trusts

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

7a At any time during 2017, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions. If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements
b If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located ▶
8 During 2017, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions

	Yes	No
7a		X
8		X

727501 10-25-17

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule B (Form 1040A or 1040) 2017

[REDACTED]

[REDACTED]

Interest and Dividend Summary

Name: BRIAN S. & SHERRI JO STAVER

FEIN/SSN:

Payer	Interest	Interest on U.S. Savings Bonds	Tax-Exempt Interest	Private Activity Interest	Original Issue Discount (OID)	Ordinary Dividends	Qualified Dividends	Capital Gain Distributions	Federal Income Tax Withheld	State Tax Withheld	Foreign Tax Paid
CERCU	10.										
STAR ONE CREDIT UNION	46.										
CISCO SYSTEMS						226.	226.				
CHARLES SCHWAB & CO., INC											
1630	30,927.										
CHARLES SCHWAB & CO., INC											
-1630 (ACCRUED INTEREST)	-2,039.										
CHARLES SCHWAB & CO., INC											
-4952	5,542.										
CHARLES SCHWAB & CO., INC											
1630						13,288.	12,914.	625.			347.
CHARLES SCHWAB & CO., INC											
-4952						1,965.	1,939.				
FROM K-1 - ENERGY TRANSFER											
PARTNERS, L.P.						34.	34.				
FROM K-1 - ENTERPRISE PRODUCTS											
PARTNERS, L.P.											
FROM K-1 - ENTERPRISE PRODUCTS											
PARTNERS, L.P. (INDIVIDUAL)						1.					
FROM K-1 - WILLIAMS											
PARTNERS, LP											
FROM K-1 - KKR & CO LP						234.	110.				
TOTALS	34,657.					15,747.	15,223.	625.			347.

**SCHEDULE D
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Capital Gains and Losses

▶ Attach to Form 1040 or Form 1040NR.

▶ Go to www.irs.gov/ScheduleD for instructions and the latest information.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074

2017

Attachment
Sequence No. 12

Name(s) shown on return

BRIAN S. & SHERRI JO STAVER

Your social security number

██████████ 7218

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	136,611.	142,624.		<6,013.>
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				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 STMT 13			4	<1.>
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1 SEE STATEMENT 15			5	60.
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions			6	()
7 Net short-term capital gain or (loss) . Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	<5,954.>

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	292,369.	294,207.		<1,838.>
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	166,688.	165,640.		1,048.
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824 SEE STATEMENT 14 SEE STATEMENT 16			11	<1.>
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	798.
13 Capital gain distributions SEE STATEMENT 17			13	625.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	()
15 Net long-term capital gain or (loss) . Combine lines 8a through 14 in column (h). Then go to Part III on page 2			15	632.

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule D (Form 1040) 2017

CONFIDENTIAL

[REDACTED]

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Schwab One® Trust Account of
 BRIAN S STAVIER TTEE
 BRIAN S. STAVIER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number:
 6076-1630

TAX YEAR 2017
 FORM 1099 COMPOSITE

Recipient's Name and Address

BRIAN S STAVIER TTEE
 BRIAN S. STAVIER REV LIVING TRU
 U/A DTD 12/05/2002
 32896 ESTATE GARDEN DR
 WESLEY CHAPEL FL 33545
 taxpayer ID Number: ***-**-7218
 Account Number: 6076-1630

Payer's Name and Address

CHARLES SCHWAB & CO., INC.
 211 MAIN STREET
 SAN FRANCISCO, CA 94105
 Telephone Number: (800) 545-2157
 Federal ID Number: 94-1737782

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017

CORRECTED

Form 1099-B

Department of the Treasury-Internal Revenue Service
 SHORI-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part I, with Box A checked.

Copy B for Recipient (OMB No. 1545-0715)

1a-Description of property (Example 100 sh. XYZ Co.) CUSIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS: Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Adjusted Market Discount 1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal income tax withheld
350 B & G FOODS INC 05508R106 / BGS	VARIOUS 07/10/17	11,802.63	15,360.04	--	(3,557.41)	0.00
Security Subtotal		\$ 11,802.63	\$ 15,360.04	--	\$(3,557.41)	0.00
100 GENERAL ELECTRIC CO 69604103 / GE	09/13/16 08/09/17	2,564.39	2,987.89	--	(423.50)	0.00
200 GENERAL ELECTRIC CO 369604103 / GE	09/13/16 08/09/17	5,128.78	5,974.96	--	(846.18)	0.00
Security Subtotal		\$ 7,693.17	\$ 8,962.85	--	\$(1,269.68)	0.00
100 GENERAL MOTORS CO 37045V100 / GM	09/12/16 01/10/17	3,788.13	3,091.95	--	696.18	0.00
Security Subtotal		\$ 3,788.13	\$ 3,091.95	--	\$ 696.18	0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



Schwab One® Trust Account of
 BRIAN S STAYER TTEE
 BRIAN S. STAYER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099-COMPOSITE

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury-Internal Revenue Service

Form 1099-B
 Copy B for Recipient (OMB No. 1545-0715)

SHORT-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part I, with Box A checked.

Taxpayer ID Number: ***-7218

Date Prepared: February 23, 2018

1a-Description of property (Example: 100 sh. XYZ Co.) USIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS: Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Acquired Market Discount 1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
1,000 J.C. PENNEY CO INC 708160106 / JCP	10/27/17	\$ 3,101.45	\$ 8,111.30		\$ (5,009.85)	\$ 0.00
Security Subtotal		\$ 3,101.45	\$ 8,111.30		\$ (5,009.85)	\$ 0.00
50 MONSANTO CO 61166W101 / MON	10/18/16 10/12/17	\$ 5,995.93	\$ 5,136.05		\$ 859.88	\$ 0.00
Security Subtotal		\$ 5,995.93	\$ 5,136.05		\$ 859.88	\$ 0.00
200 NEWELL BRANDS INC 651229106 / NWL	VARIOUS 06/14/17	\$ 10,994.81	\$ 9,938.10		\$ 1,056.71	\$ 0.00
Security Subtotal		\$ 10,994.81	\$ 9,938.10		\$ 1,056.71	\$ 0.00
200 PINNACLE FOODS INC 72348P104 / PF	11/11/16 01/04/17	\$ 10,790.75	\$ 9,494.95		\$ 1,295.80	\$ 0.00
Security Subtotal		\$ 10,790.75	\$ 9,494.95		\$ 1,295.80	\$ 0.00
500 QUOTIENT TECHNOLOGY 749119103 / QUOT	09/12/16 08/30/17	\$ 7,369.88	\$ 6,496.67		\$ 873.21	\$ 0.00
Security Subtotal		\$ 7,369.88	\$ 6,496.67		\$ 873.21	\$ 0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



Schwab One® Trust Account of
 BRIAN S STAYER TTEE
 BRIAN S. STAYER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099 COMPOSITE

Taxpayer ID Number: ***-**-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury-Internal Revenue Service

Form 1099-B

Copy B for Recipient (OMB No. 1545-0715)

SHORT-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part I, with Box A checked.

1a-Description of property (Example 100 sh. XYZ Co.) CUSIP Number / Symbol	1b-Date acquired	1c-Date sold or disposed	1d-Proceeds Reported to IRS, Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Accrued Market Discount	1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
200 SALESFORCE COM 79466L302 / CRM	11/01/17	11/08/17	\$ 20,987.49	\$ 20,701.30			\$ 286.19	0.00
Security Subtotal			\$ 20,987.49	\$ 20,701.30			\$ 286.19	0.00
150 WELLS FARGO BK N A 949746101 / WFC	09/13/16	08/09/17	\$ 7,870.14	\$ 7,078.45			\$ 791.69	0.00
Security Subtotal			\$ 7,870.14	\$ 7,078.45			\$ 791.69	0.00
Total Short-Term (Cost basis is reported to the IRS)			\$ 90,394.38	\$ 94,371.66				
Total Short-Term Sales Price of Stocks, Bonds, etc.			\$ 90,394.38	\$ 94,371.66				

FATCA Filing Requirement

Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



Schwab One® Trust Account of
 BRIAN S STAYER TTEE
 BRIAN S. STAYER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099-COMPOSITE

Taxpayer ID Number: ***-**-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Form 1099-B

Department of the Treasury-Internal Revenue Service

Copy B for Recipient (OMB No. 1545-0715)

LONG-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part II, with Box D checked.

1a-Description of property (Example: 100 sh. XYZ Co.) J/SIP Number / Symbol	1b-Date acquired	1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS Gross Proceeds (except where indicated)	1e-Cost or other Basis	1f-Acquired Market Discount	1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income Tax Withheld
25,000 E-TRADE FINANCI 5.375XXX** CALLED**	R	08/15/16	\$ 26,203.60	\$ 26,552.24	--	--	\$ (348.64)	0.00
269246BL7		08/25/17						
Security Subtotal			\$ 26,203.60	\$ 26,552.24	--	--	\$ (348.64)	0.00
400 GENERAL MOTORS CO 37045V100 / GM	S	VARIOUS 01/10/17	\$ 15,152.51	\$ 14,745.90	--	--	\$ 406.61	0.00
Security Subtotal			\$ 15,152.51	\$ 14,745.90	--	--	\$ 406.61	0.00
50,000 HERTZ CORP 4.25XXX** CALLED**	R	04/01/14 06/29/17	\$ 50,948.97	\$ 50,340.17	--	--	\$ 608.80	0.00
428040CR8								
Security Subtotal			\$ 50,948.97	\$ 50,340.17	--	--	\$ 608.80	0.00
*.000 J/C PENNEY CO INC 18160106 / JCP	S	09/13/16 10/27/17	\$ 3,101.46	\$ 9,487.95	--	--	\$ (6,386.49)	0.00
Security Subtotal			\$ 3,101.46	\$ 9,487.95	--	--	\$ (6,386.49)	0.00
100 KRAFT HEINZ COMPANY 500754106 / KHC	S	09/12/16 09/20/17	\$ 7,954.71	\$ 8,695.95	--	--	\$ (741.24)	0.00
Security Subtotal			\$ 7,954.71	\$ 8,695.95	--	--	\$ (741.24)	0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



Schwab One® Trust Account of
 BRIAN S STAVNER TTEE
 BRIAN S. STAVNER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099-COMPOSITE

Taxpayer ID Number: ***-**-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Form 1099-B

Department of the Treasury-Internal Revenue Service

Copy B for Recipient (OMB No. 1545-0715)

LONG-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part II, with Box D checked.

1a-Description of property (Example 100 sh XYZ Co.) CUSIP Number / Symbol	1b-Date acquired	1c-Date sold or disposed	1d-Proceeds Reported to IRS: Gross Proceeds (Except where indicated)	1e-Cost or other basis	1f-Accrued Market Discount 1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
100.MONSANTO.CO 61166W101 / MON		09/13/16 10/12/17	\$ 11,991.86	\$ 10,596.95		\$ 1,394.91	\$ 0.00
Security Subtotal			\$ 11,991.86	\$ 10,596.95		\$ 1,394.91	\$ 0.00
300.ROCHE.HLDG.AG 77195104 / RHBY		03/05/14 09/29/17	\$ 9,522.92	\$ 11,213.95		\$ (1,691.03)	\$ 0.00
Security Subtotal			\$ 9,522.92	\$ 11,213.95		\$ (1,691.03)	\$ 0.00
45,000.SAFEWAY.INC 6.35XXX**MATURED** 786514BP3	MT	05/17/16 08/15/17	\$ 45,000.00	\$ 45,000.00		\$ 0.00	\$ 0.00
Security Subtotal			\$ 45,000.00	\$ 45,000.00		\$ 0.00	\$ 0.00
Total Long-Term (Cost basis is reported to the IRS)			\$ 66,514.78	\$ 66,810.90		\$ (287.12)	\$ 0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

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Schwab One® Trust Account of
 BRIAN S STAVERT TTEE
 BRIAN S. STAVERT REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099-COMPOSITE

Taxpayer ID Number: ...-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury Internal Revenue Service

Copy B for Recipient (OMB No. 1545-0715)

LONG-TERM TRANSACTIONS FOR WHICH BASIS IS AVAILABLE BUT NOT REPORTED TO THE IRS - Report on Form 8949, Part II, with Box E checked.

1a-Description of property (Example 100 sh. XYZ Co.) :USIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 5-Reported to IRS Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Acquired Market Discount 1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
20,000 ALLY FINANCIAL IN 5.5XXX**MATURED**	MT 09/27/12 02/15/17	\$ 20,000.00	\$ 20,000.00	\$ -	\$ 0.00	0.00
02005NAL4 Security Subtotal		\$ 20,000.00	\$ 20,000.00	\$ -	\$ 0.00	0.00
200 CONOCOPHILLIPS 20825C104 / COP	S VARIOUS 08/09/17	\$ 9,092.84	\$ 7,634.42	\$ -	\$ 1,458.42	0.00
Security Subtotal		\$ 9,092.84	\$ 7,634.42	\$ -	\$ 1,458.42	0.00
75,000 DISH DBS CORP OR 4.625XXX**MATURED** 25470XAH8	MT 05/01/13 07/15/17	\$ 75,000.00	\$ 75,000.00	\$ -	\$ 0.00	0.00
Security Subtotal		\$ 75,000.00	\$ 75,000.00	\$ -	\$ 0.00	0.00
600 KKR & COLP LP 8248M102 / KKR	S VARIOUS 12/20/17	\$ 12,595.18	\$ 11,045.78	\$ -	\$ 1,549.40	0.00
Security Subtotal		\$ 12,595.18	\$ 11,045.78	\$ -	\$ 1,549.40	0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

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Schwab One® Trust Account of
 BRIAN S STAVER TTEE
 BRIAN S. STAVER REV LIVING TRU
 U/A DTD 12/05/2002

Account Number
 6076-1630

TAX YEAR 2017
 FORM 1099 COMPOSITE

Taxpayer ID Number: ***-7218

Date Prepared: February 23, 2016

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury-Internal Revenue Service

Form 1099-B

Copy B for Recipient (OMB No. 1545-0715)

LONG-TERM TRANSACTIONS FOR WHICH BASIS IS AVAILABLE BUT NOT REPORTED TO THE IRS - Report on Form 8949, Part II, with Box E checked.

1a-Description of property (Example 100 sh. XYZ Co.) CUSIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Accrued Market Discount	1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
50,000 T-MOBILE US INC 6.464XXX**CALLED** 87264AAC9	R 12/13/13 04/28/17	\$ 50,000.00	\$ 51,458.05			\$ (1,458.05)	0.00
Security Subtotal		\$ 50,000.00	\$ 51,458.05			\$ (1,458.05)	0.00
Total Long-Term (Cost basis is available but not reported to the IRS)		\$ 166,688.02	\$ 165,138.25				
Total Long-Term Sales Price of Stocks, Bonds, etc.		\$ 336,564.05	\$ 341,771.36				
Total Sales Price of Stocks, Bonds, etc.		\$ 426,958.43					
Total Federal Income Tax Withheld		\$ 0.00					

FATCA Filing Requirement

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Schwab One® Account of
**BRIAN S STAYER &
 SHERRI JO STAYER JT TEN**

Account Number
3905-4952

**TAX YEAR 2017
 FORM 1099 COMPOSITE**

Date Prepared: February 23, 2018

Recipient's Name and Address

**BRIAN S STAYER &
 SHERRI JO STAYER JT TEN
 32896 ESTATE GARDEN DR
 WESLEY CHAPEL FL 33545**

Taxpayer ID Number: ****-7218
 Account Number: 3905-4952

Payer's Name and Address

**CHARLES SCHWAB & CO., INC.
 211 MAIN STREET
 SAN FRANCISCO, CA 94105**

Telephone Number: (800) 515-2157
 Federal ID Number: 94-1737782

Proceeds from Broker Transactions — 2017

Department of the Treasury-Internal Revenue Service

SHORT-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part I, with Box A checked.

CORRECTED

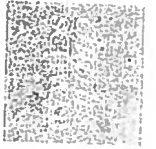
Form 1099-B

Copy B for Recipient (OMB No. 1545-0715)

1a-Description of property (Example 100 sh. XYZ Co.) CUSIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds Reported to IRS, Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Accrued Market Discount	1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income Tax Withheld
125 B & G FOODS INC 05508R106 / BGS	10/28/16	\$ 4,324.65	\$ 5,272.05	--	--	(947.40)	0.00
Security Subtotal	07/07/17	\$ 4,324.65	\$ 5,272.05	--	--	(947.40)	0.00
154 BARON SMALL CAP FD 068278308 / BSCFX	11/29/16	\$ 4,518.55	\$ 3,937.16	--	--	581.39	0.00
Security Subtotal	06/06/17	\$ 4,518.55	\$ 3,937.16	--	--	581.39	0.00
300 CENTURYLINK INC 156700106 / CTL	05/08/17	\$ 5,594.12	\$ 7,393.02	--	--	(1,798.90)	0.00
Security Subtotal	08/18/17	\$ 5,594.12	\$ 7,393.02	--	--	(1,798.90)	0.00

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

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Schwab One® Account of
 BRIAN S STAVER &
 SHERRI JO STAVER JT TEN

Account Number
 3905-4952

TAX YEAR 2017
 FORM 1099-COMPOSITE

Taxpayer ID Number: ***-**-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury-Internal Revenue Service

Form 1099-B

SHORT-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part I, with Box A checked.

Copy B for Recipient (OMB No. 1545-0715)

1a-Description of property (Example 100 sh. XYZ Co.) CUSIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS: Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Accrued Market Discount	1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
30,000 YUM BRANDS INC DUE 09/15/19 988498AF8	06/15/16 02/03/17	\$ 31,779.30	\$ 31,649.56			\$ 129.74	0.00
Security Subtotal		\$ 31,779.30	\$ 31,649.56			\$ 129.74	0.00
Total Short-Term (Cost basis is reported to the IRS)		\$ 46,216.62	\$ 48,251.79				
Total Short-Term Sales Price of Stocks, Bonds, etc.		\$ 46,216.62	\$ 48,251.79				

FATCA Filing Requirement

Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

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Schwab One® Account of
 BRIAN S STAYER &
 SHERRI JO STAYER JT TEN

Account Number
 3905-4952

TAX YEAR 2017
 FORM 1099-B COMPOSITE

Taxpayer ID Number: ***-**-7218

Date Prepared: February 23, 2018

Proceeds from Broker Transactions — 2017 (continued)

Department of the Treasury-Internal Revenue Service

Copy B for Recipient (OMB No. 1545-0715)

Form 1099-B

LONG-TERM TRANSACTIONS FOR WHICH BASIS IS REPORTED TO THE IRS - Report on Form 8949, Part II, with Box D checked.

1a-Description of property (Example 100 sh. XYZ Co.) :USIP Number / Symbol	1b-Date acquired 1c-Date sold or disposed	1d-Proceeds 6-Reported to IRS: Gross Proceeds (except where indicated)	1e-Cost or other basis	1f-Acquired Market Discount 1g-Wash Sale Loss Disallowed	Realized Gain or (Loss)	4-Federal Income tax withheld
50 HONEYWELL INTL INC 438516106 / HON	09/14/15 11/30/17	\$ 7,804.58	\$ 4,953.09	--	\$ 2,851.49	0.00
Security Subtotal		\$ 7,804.58	\$ 4,953.09	--	\$ 2,851.49	0.00
100 MONDELEZ INTL 609207105 / MDLZ	09/14/15 06/06/17	\$ 4,707.95	\$ 4,186.83	--	\$ 521.12	0.00
Security Subtotal		\$ 4,707.95	\$ 4,186.83	--	\$ 521.12	0.00
100 PEPSICO INCORPORATED 713448108 / PEP	09/14/15 02/03/17	\$ 10,473.62	\$ 9,110.45	--	\$ 1,363.17	0.00
Security Subtotal		\$ 10,473.62	\$ 9,110.45	--	\$ 1,363.17	0.00
100 PINNACLE FOODS INC 72348P104 / PF	09/15/15 01/04/17	\$ 5,390.90	\$ 4,453.35	--	\$ 937.55	0.00
Security Subtotal		\$ 5,390.90	\$ 4,453.35	--	\$ 937.55	0.00
100 WELLS FARGO BK NA 949746101 / WFC	09/14/15 08/09/17	\$ 5,245.11	\$ 5,287.85	--	\$ (42.74)	0.00
Security Subtotal		\$ 5,245.11	\$ 5,287.85	--	\$ (42.74)	0.00
Total Long-Term (Cost basis is reported to the IRS)		\$ 122,492.91	\$ 117,573.98	--		

FATCA Filing Requirement
 Please see the "Notes for Your Form 1099-B" section for additional explanation of this Form 1099-B report.

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Qualified Dividends and Capital Gain Tax Worksheet - Line 44

Keep for Your Records

Name(s) shown on return
BRIAN S. & SHERRI JO STAVER

Your SSN
[REDACTED] 7218

Before you begin:

- ✓ See the instructions for line 44 to see if you can use this worksheet to figure your tax.
- ✓ Before completing this worksheet, complete Form 1040 through line 43.
- ✓ If you don't have to file Schedule D and you received capital gain distributions, be sure you checked the box on line 13 of Form 1040.

1.	Enter the amount from Form 1040, line 43. However, if you are filing Form 2555 or 2555-EZ (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	20,743.
2.	Enter the amount from Form 1040, line 9b*	2.	15,223.
3.	Are you filing Schedule D?*		
	<input checked="" type="checkbox"/> Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or 16 is blank or a loss, enter -0-.	3.	0.
	<input type="checkbox"/> No. Enter the amount from Form 1040, line 13.		
4.	Add lines 2 and 3	4.	15,223.
5.	If filing Form 4952 (used to figure investment interest expense deduction), enter any amount from line 4g of that form. Otherwise, enter -0-	5.	0.
6.	Subtract line 5 from line 4. If zero or less, enter -0-	6.	15,223.
7.	Subtract line 6 from line 1. If zero or less, enter -0-	7.	5,520.
8.	Enter: \$ 37,950 if single or married filing separately, \$ 75,900 if married filing jointly or qualifying widow(er), \$ 50,800 if head of household.	8.	75,900.
9.	Enter the smaller of line 1 or line 8	9.	20,743.
10.	Enter the smaller of line 7 or line 9	10.	5,520.
11.	Subtract line 10 from line 9. This amount is taxed at 0%	11.	15,223.
12.	Enter the smaller of line 1 or line 6	12.	15,223.
13.	Enter the amount from line 11	13.	15,223.
14.	Subtract line 13 from line 12	14.	0.
15.	Enter: \$ 418,400 if single, \$ 235,350 if married filing separately, \$ 470,700 if married filing jointly or qualifying widow(er), \$ 444,550 if head of household.	15.	470,700.
16.	Enter the smaller of line 1 or line 15	16.	20,743.
17.	Add lines 7 and 11	17.	20,743.
18.	Subtract line 17 from line 16. If zero or less, enter -0-	18.	0.
19.	Enter the smaller of line 14 or line 18	19.	0.
20.	Multiply line 19 by 15% (0.15)	20.	0.
21.	Add lines 11 and 19	21.	15,223.
22.	Subtract line 21 from line 12	22.	0.
23.	Multiply line 22 by 20% (0.20)	23.	0.
24.	Figure the tax on the amount on line 7. If the amount on line 7 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 7 is \$100,000 or more, use the Tax Computation Worksheet	24.	553.
25.	Add lines 20, 23, and 24	25.	553.
26.	Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	26.	2,176.
27.	Tax on all taxable income. Enter the smaller of line 25 or 26. Also include this amount on Form 1040, line 44. If you are filing Form 2555 or 2555-EZ, don't enter this amount on Form 1040, line 44. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	27.	553.

*If you are filing Form 2555 or 2555-EZ, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

SECRET

SCHEDULE E
(Form 1040)

Supplemental Income and Loss

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

OMB No. 1545-0074

2017
Attachment
Sequence No. **13**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040NR, or Form 1041.

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

Name(s) shown on return

Your social security number

BRIAN S. & SHERRI JO STAVER

██████████ 7218

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

- A Did you make any payments in 2017 that would require you to file Form(s) 1099? (see instructions) Yes No
 B If "Yes," did you or will you file required Forms 1099? Yes No

1a Physical address of each property (street, city, state, ZIP code)
 A **KKR & CO LP - ROYALTY**
 B **9261 N CONGRESS ST, NEW MARKET, VA 22844-9506**

1b Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
A 6				<input type="checkbox"/>
B 1		365		<input type="checkbox"/>
C				<input type="checkbox"/>

Type of Property:

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

Income:	Properties:	A	B	C
3 Rents received	3		1,400.	
4 Royalties received	4	16.		
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions	8			
9 Insurance	9			
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13			
14 Repairs	14		1,300.	
15 Supplies	15			
16 Taxes	16		413.	
17 Utilities	17			
18 Depreciation expense or depletion	18		2,311.	
19 Other (list) ▶ STMT 19	19	2.		
20 Total expenses. Add lines 5 through 19	20	2.	4,024.	
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	14.	-2,624.	
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22		2,624.)	
23a Total of all amounts reported on line 3 for all rental properties	23a		1,400.	
b Total of all amounts reported on line 4 for all royalty properties	23b		16.	
c Total of all amounts reported on line 12 for all properties	23c			
d Total of all amounts reported on line 18 for all properties	23d		2,311.	
e Total of all amounts reported on line 20 for all properties	23e		4,026.	
24 Income. Add positive amounts shown on line 21. Do not include any losses	24		14.	
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25		2,624.)	
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26		-2,610.	

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

Schedule E (Form 1040) 2017



Name(s) shown on return. Do not enter name and social security number if shown on page 1.

Your social security number

BRIAN S. & SHERRI JO STAVER

[REDACTED] - 7218

Caution: The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II Income or Loss From Partnerships and S Corporations Note: If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 6198. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk, excess farm loss, or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? [X] Yes [] No

Table with 5 columns: (a) Name, (b) Enter P for partnership, S for S corporation, (c) Check if foreign partnership, (d) Employer identification number, (e) Check if any amount is not at risk. Row A: SEE STATEMENT 20

Table with 5 columns: (f) Passive loss allowed, (g) Passive income from Schedule K-1, (h) Nonpassive loss from Schedule K-1, (i) Section 179 expense deduction from Form 4562, (j) Nonpassive income from Schedule K-1. Totals: 39, 7,111, -7,072

Part III Income or Loss From Estates and Trusts

Table with 2 columns: (a) Name, (b) Employer identification number. Rows A and B are blank.

Table with 4 columns: (c) Passive deduction or loss allowed, (d) Passive income from Schedule K-1, (e) Deduction or loss from Schedule K-1, (f) Other income from Schedule K-1. Totals: 35, 36, 37

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

Table with 5 columns: (a) Name, (b) Employer identification number, (c) Excess inclusion from Schedules Q, line 2c, (d) Taxable income (net loss) from Schedules Q, line 1b, (e) Income from Schedules Q, line 3b. Row 39: Combine columns (d) and (e) only.

Part V Summary * ENTIRE DISPOSITION OF PASSIVE ACTIVITY

Table with 2 columns: Description, Amount. Row 40: Net farm rental income or (loss) from Form 4835. Row 41: Total income or (loss). Row 42: Reconciliation of farming and fishing income. Row 43: Reconciliation for real estate professionals.



SCHEDULE E

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

Name BRIAN S. STAYER
 Passthrough ENERGY TRANSFER PARTNERS, L.P.
 PUBLICLY TRADED PARTNERSHIP

ID 73-1493906

SSN/EIN 229-94-7218
 TAXPAYER

OTHER PASSIVE SCHEDULE E, PAGE 2

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
Ordinary business income (loss)	-63.							
Rental real estate income (loss)								
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-63.					1,556.	1,619.	
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-63.					1,556.	1,619.	
FORM 4797								
Section 1231 gain (loss)						64.	64.	
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)	56.							56.
Net long-term cap. gain (loss)	312.							312.
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A	26.							26.
Other net investment income	-6.							-6.
ITEMIZED DEDUCTIONS								
Charitable contributions	2.							2.
Deductions related to portfolio income								
Other								

SCHEDULE E
INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2017

Name BRYAN S. SRAVER
Passthrough ENERGY TRANSFER PARTNERS, L.P.
PUBLICLY TRADED PARTNERSHIP

ID 73-1493906

SSN/EIN 229-94-7218
TAXPAYER

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
OTHER PASSIVE								
INTEREST AND DIVIDENDS								
Interest Income	32.							32.
Interest from U.S. bonds								
Ordinary dividends	34.							34.
Qualified dividends	34.							34.
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	-15.							-15.
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

SCHEDULE E
INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

Name **BRIAN S. SWAYER**
 Passthrough **ENTERPRISE PRODUCTS PARTNERS, L.P.**
 PUBLICLY TRADED PARTNERSHIP

ID **76-0568219**

SSN/EIN **229-94-7218**
 TAXPAYER

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
OTHER PASSIVE								
Ordinary business income (loss)	-242.							
Rental real estate income (loss)								
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-242.					3,893.	4,134.	-1.
First passive other	1.							1.
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-241.					3,893.	4,134.	
FORM 4797								
Section 1231 gain (loss)	-7.					100.	107.	
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income								
Other								

SCHEDULE E

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2017

Name BRYAN S. STRAYER

Passthrough ENTERPRISE PRODUCTS PARTNERS, L.P.

ID 76-0568219

SSN/EIN 229-94-7218

PUBLICLY TRADED PARTNERSHIP

TAXPAYER

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
OTHER PASSIVE								
INTEREST AND DIVIDENDS								
Interest income	3.							3.
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86								
Adjusted gain or loss	-15.							-15.
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

SCHEDULE E
INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

Name BRIAN S. STAYER
 Passthrough WILLIAMS PARTNERS, LP
 PUBLICLY TRADED PARTNERSHIP

ID 20-2485124

SSN/EIN 229-94-7218
 TAXPAYER

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
OTHER PASSIVE								
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	36.							
Rental real estate income (loss)	1.							
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	37.					7,105.		-7,068.
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	37.					7,105.		-7,068.
FORM 4797								
Section 1231 gain (loss)								
Section 179 recapture on disposition						116.		-116.
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income								
Other								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2017

SCHEDULE E
 Name BRIAN S. STAYER
 Passthrough WILLIAMS PARTNERS, LP
 PUBLICLY TRADED PARTNERSHIP
 ID 20-2485124
 SSN/EIN 229-94-7218
 TAXPAYER

OTHER PASSIVE INTEREST AND DIVIDENDS	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
Interest income								
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	13.							13.
Adjusted gain or loss	-3.							-3.
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing Inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

SCHEDULE E

Name BRYAN S. & SHERRI JO STAVER

Passthrough ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)

ID 76-0568219

SSN/EIN [REDACTED]-7218

JOINT

PUBLICLY TRADED PARTNERSHIP

OTHER PASSIVE

SCHEDULE E, PAGE 2

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
Ordinary business income (loss)	-532.							
Rental real estate income (loss)								
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-532.					790.	1,322.	
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-532.					790.	1,322.	
FORM 4797								
Section 1231 gain (loss)	-11.					13.	24.	
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income								
Other								

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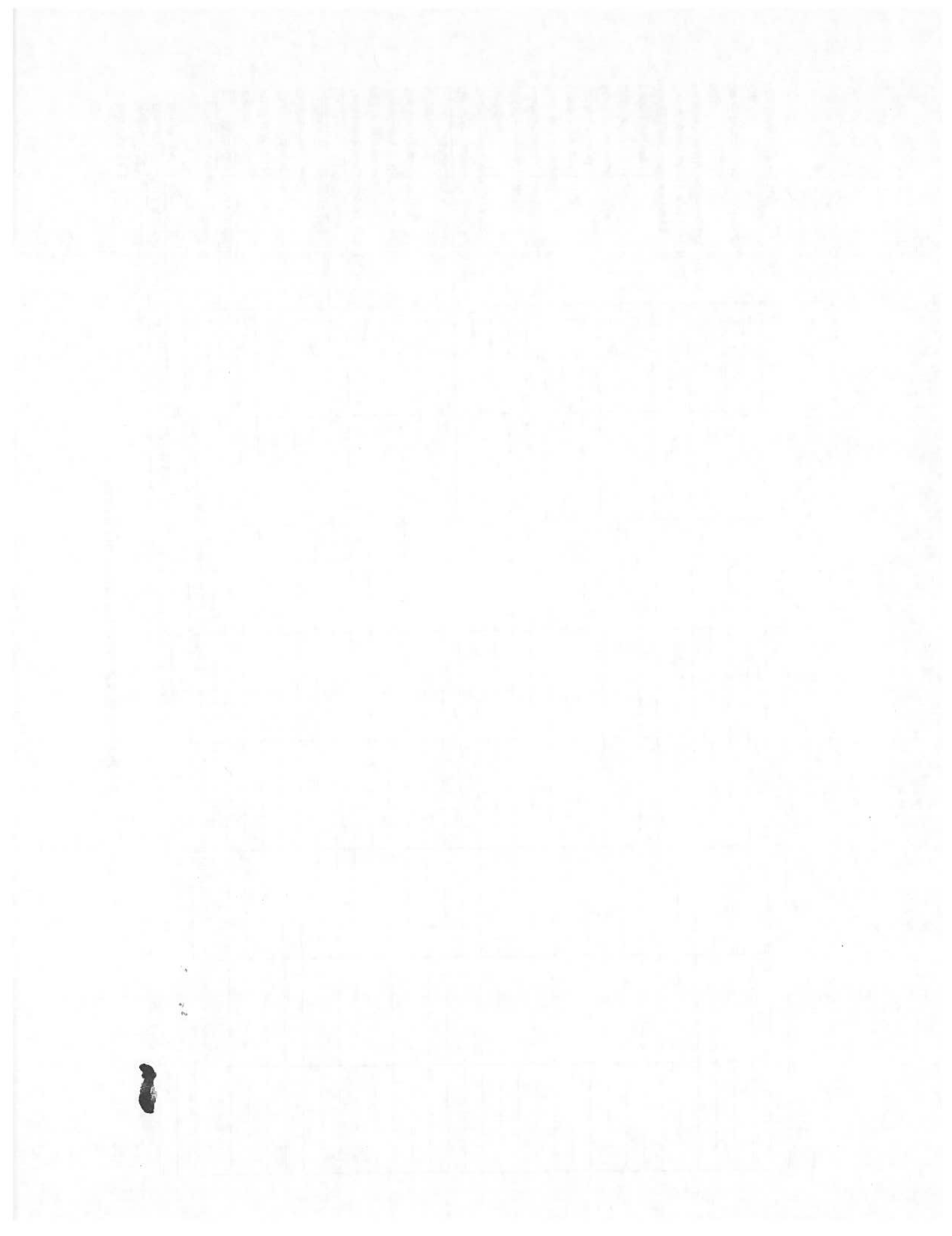
SCHEDULE E
INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

Name **BRIAN S. & SHERRI JO STAVER**
Passthrough ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)
 PUBLICLY TRADED PARTNERSHIP

ID **76-0568219**

SSN/EIN **[REDACTED]**
 JOINT **7218**
 2017

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income	1.							1.
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	4.							4.
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								



SCHEDULE E

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

Name **BRIAN S. & SHERRI JO STAYER**
 Passthrough **WILLIAMS PARTNERS, LP**
 PUBLICLY TRADED PARTNERSHIP

ID **20-2485124**

SSN/EIN **[REDACTED]**
 JOINT **7218**

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	-489.							
Rental real estate income (loss)	-1.							
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-490.					852.	1,342.	
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-490.					852.	1,342.	
FORM 4797								
Section 1231 gain (loss)	-371.					42.	413.	
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions	2.							
Deductions related to portfolio income								
Other								

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SCHEDULE E

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2017

Name BRIAN S. & SHERRI JO STAYER
 Passthrough WILLIAMS PARTNERS, LP
 PUBLICLY TRADED PARTNERSHIP

ID 20-2485124

SSN/EIN [REDACTED] 7218
 JOINT

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income	3.							3.
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	120.							120.
Adjusted gain or loss	-18.							-18.
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

1

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2017

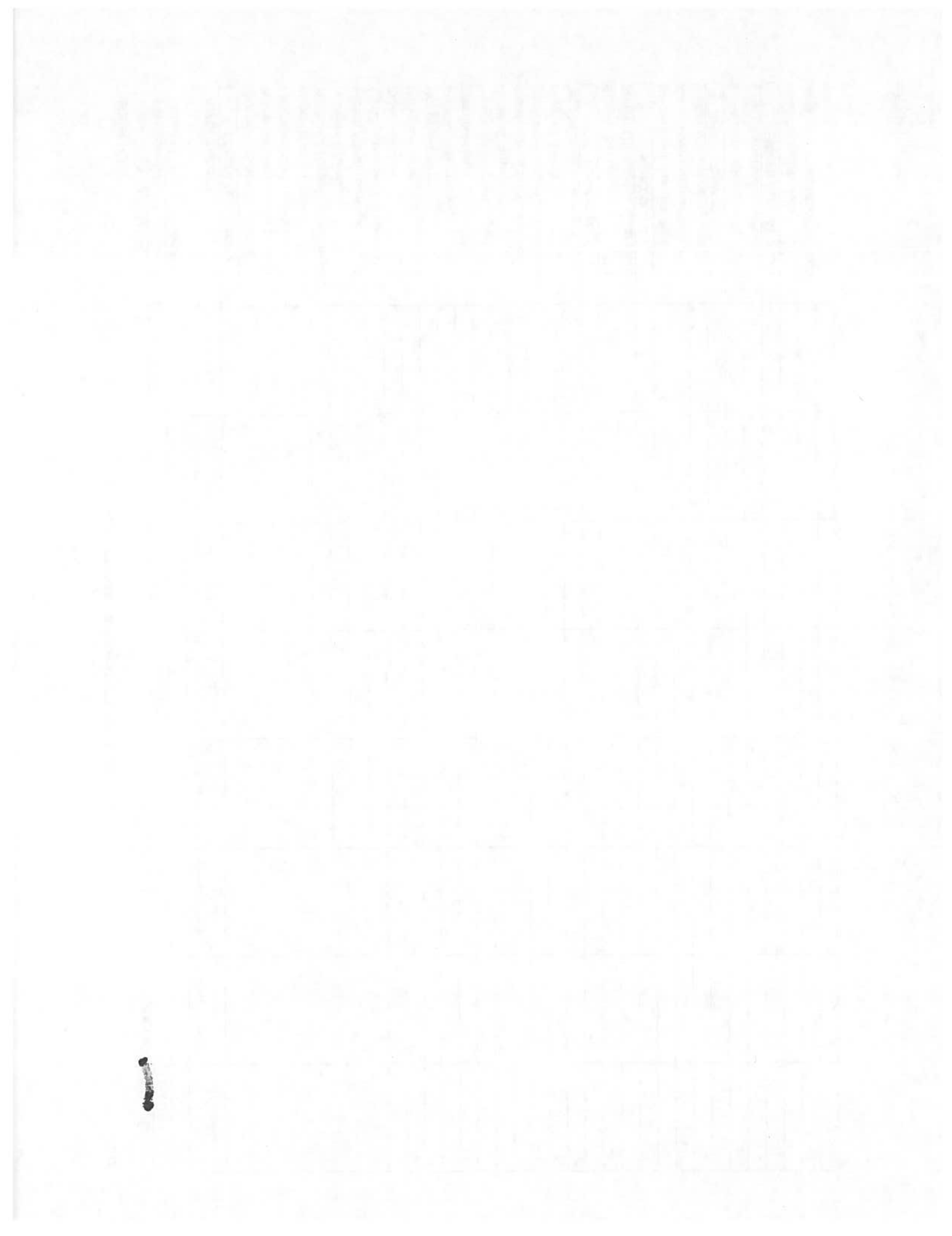
SCHEDULE E

Name BRIAN S. STAVER
Passthrough KKR & CO LP
 PUBLICLY TRADED PARTNERSHIP

ID 26-0426107

SSN/EIN ██████████ 7218
 TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	24.							
Rental real estate income (loss)	-8.							
Other net rental income (loss)								
Intangible drilling costs/dry hole costs	8.							
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	8.							8.
First passive other								
Second passive other								
Cost depletion	16.							16.
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other	4.							4.
Total Schedule E (page 2)	-4.							-4.
FORM 4797								
Section 1231 gain (loss)	-98.							-98.
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)	4.							4.
Net long-term cap. gain (loss)	486.							486.
Section 1256 contracts & straddles	-2.							-2.
FORM 4952								
Investment interest expense - Sch. A	56.							56.
Other net investment income	2.							2.
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income	24.							24.
Other								



INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2017

SCHEDULE E

Name **BRIAN S. STAVER**
 Passthrough **KKR & CO LP**
 PUBLICLY TRADED PARTNERSHIP

ID **26-0426107**

SSN/EIN **7218**
 TAXPAYER

	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
OTHER PASSIVE								
INTEREST AND DIVIDENDS								
Interest income	132.							132.
Interest from U.S. bonds								
Ordinary dividends	234.							234.
Qualified dividends	110.							110.
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	2.							2.
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other	-26.							-26.
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing Inc								
Royalties	16.							16.
Royalty expenses/depletion	2.							2.
Undistributed capital gains credit								
Backup withholding	2.							2.
Credit for estimated tax								
Cancellation of debt	4.							4.
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits	6.							6.
Casualty and theft loss								

1

Schedule E

Publicly Traded Partnerships

Name of Activity: ENERGY TRANSFER PARTNERS, L.P.

Activity net income
 Activity net loss -63.
 Prior year unallowed losses -1,620.
 Net income (loss) -1,683.

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,683.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-63.	1,556.	-1,619.	1,619.	
FORM 4797	0.	64.	-64.	64.	
	<u>-63.</u>	<u>1,620.</u>	<u>-1,683.</u>	<u>1,683.</u>	

Alternative Minimum Tax

Activity net income
 Activity net loss -78.
 Prior year unallowed losses -1,683.
 Net income (loss) -1,761.

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,761.

Alternative minimum tax adjustment

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-78.	1,619.	-1,697.	1,697.	
FORM 4797	0.	64.	-64.	64.	
	<u>-78.</u>	<u>1,683.</u>	<u>-1,761.</u>	<u>1,761.</u>	

Schedule E

Publicly Traded Partnerships

Name of Activity: **ENTERPRISE PRODUCTS PARTNERS, L.P.**

Activity net income
 Activity net loss -248.
 Prior year unallowed losses -3,993.
 Net income (loss) -4,241.

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 4,241.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-241.	3,893.	-4,134.	4,134.	
FORM 4797	-7.	100.	-107.	107.	
	<u>-248.</u>	<u>3,993.</u>	<u>-4,241.</u>	<u>4,241.</u>	

Alternative Minimum Tax

Activity net income
 Activity net loss -263.
 Prior year unallowed losses -3,933.
 Net income (loss) -4,196.

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 4,196.

Alternative minimum tax adjustment

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-256.	3,833.	-4,089.	4,089.	
FORM 4797	-7.	100.	-107.	107.	
	<u>-263.</u>	<u>3,933.</u>	<u>-4,196.</u>	<u>4,196.</u>	

Schedule E

Publicly Traded Partnerships

Name of Activity: ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)

Activity net income	
Activity net loss	-543.
Prior year unallowed losses	<u>-803.</u>
Net income (loss)	<u>-1,346.</u>

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,346.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-532.	790.	-1,322.	1,322.	
FORM 4797	-11.	13.	-24.	24.	
	<u>-543.</u>	<u>803.</u>	<u>-1,346.</u>	<u>1,346.</u>	

Alternative Minimum Tax

Activity net income	
Activity net loss	-539.
Prior year unallowed losses	<u>-751.</u>
Net income (loss)	<u>-1,290.</u>

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,290.

Alternative minimum tax adjustment

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-528.	738.	-1,266.	1,266.	
FORM 4797	-11.	13.	-24.	24.	
	<u>-539.</u>	<u>751.</u>	<u>-1,290.</u>	<u>1,290.</u>	

Schedule E

Publicly Traded Partnerships

Name of Activity: **KKR & CO LP**

Activity net income
 Activity net loss -104.
 Prior year unallowed losses _____
 Net income (loss) -104. **100% DISPOSITION**
 Total loss allowed from the PTP for 2017 104.
 Disallowed losses from this PTP

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-6.	0.	-6.		6.
FORM 4797	-98.	0.	-98.		98.
	-104.		-104.		104.

Alternative Minimum Tax

Activity net income
 Activity net loss -128.
 Prior year unallowed losses _____
 Net income (loss) -128. **100% DISPOSITION**
 Total loss allowed from the PTP for 2017 128.
 Disallowed losses from this PTP
 Alternative minimum tax adjustment -24.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-30.	0.	-30.		30.
FORM 4797	-98.	0.	-98.		98.
	-128.		-128.		128.

Schedule E

Publicly Traded Partnerships

Name of Activity: WILLIAMS PARTNERS, LP

Activity net income	37.	
Activity net loss		
Prior year unallowed losses	<u>-7,221.</u>	
Net income (loss)	<u>-7,184.</u>	100% DISPOSITION
Total loss allowed from the PTP for 2017	7,221.	

Disallowed losses from this PTP

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	37.	7,105.	-7,068.		7,068.
FORM 4797	0.	116.	-116.		116.
	<u>37.</u>	<u>7,221.</u>	<u>-7,184.</u>		<u>7,184.</u>

Alternative Minimum Tax

Activity net income	47.	
Activity net loss		
Prior year unallowed losses	<u>-6,822.</u>	
Net income (loss)	<u>-6,775.</u>	100% DISPOSITION
Total loss allowed from the PTP for 2017	6,822.	

Disallowed losses from this PTP

Alternative minimum tax adjustment 409.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	47.	6,706.	-6,659.		6,659.
FORM 4797	0.	116.	-116.		116.
	<u>47.</u>	<u>6,822.</u>	<u>-6,775.</u>		<u>6,775.</u>

Schedule E

Publicly Traded Partnerships

Name of Activity: WILLIAMS PARTNERS, LP

Activity net income	
Activity net loss	-861.
Prior year unallowed losses	<u>-894.</u>
Net income (loss)	<u>-1,755.</u>

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,755.

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-490.	852.	-1,342.	1,342.	
FORM 4797	-371.	42.	-413.	413.	
	<u>-861.</u>	<u>894.</u>	<u>-1,755.</u>	<u>1,755.</u>	

Alternative Minimum Tax

Activity net income	
Activity net loss	-759.
Prior year unallowed losses	<u>-800.</u>
Net income (loss)	<u>-1,559.</u>

Total loss allowed from the PTP for 2017

Disallowed losses from this PTP 1,559.

Alternative minimum tax adjustment

Form or Schedule	Gain/Loss	Prior Year Carryover	Net Gain/Loss	Unallowed Loss	Allowed Loss
SCH E	-388.	758.	-1,146.	1,146.	
FORM 4797	-371.	42.	-413.	413.	
	<u>-759.</u>	<u>800.</u>	<u>-1,559.</u>	<u>1,559.</u>	

Schedule of Mineral Interest Properties - Summary

Identifying Number	7218	Taxable income including NOL carryover	20,743.
Name	BRIAN S. SPAVER	Plus allowable depletion	16.
		Minus cost depletion	16.
		Taxable income before % depletion	20,743.
		65% of taxable income	13,483.

Property Number	Property Description	Gross Income	Royalty Paid	Severance Tax	Operating Expense	IDC Expense	Dry Hole Costs	Other Expenses	Depreciation	Amortization	Overhead Expense	Net Income Before Depletion
1	KKR & CO LP	114.			72.	8.						34.
TOTALS		114.			72.	8.						34.

Property Number	Property Description	% Depletion	% Depletion Limited to Net Income	Daily Production (Barrel)	Quantity Limitation Rate	% Depletion After Quantity Limitation	Cost Depletion	Prior Year % Depletion C/O	Greater of Cost or % Depletion	% Depletion 1st Iteration	Allocation Ratio	* Limited % Depletion	% Depletion Final Iteration
1	KKR & CO LP		16.	18.	1.000000		16.		16.				
TOTALS			16.	18.			16.		16.				

Property Number	Property Description	Reallocation Ratio	* Allowable Depletion	Net Income After Depletion	% Depletion C/O To Next Year	Excess Depletion	Beginning Accum. IDC	Amortized Pref. IDC Expense	* Net Income for Excess IDC Calc.	Excess IDC	* Cost Depletion for 65% Limit	Reserved	Reserved
1	KKR & CO LP		16.	18.					28.	10.	16.		
TOTALS			16.	18.					28.	10.	16.		

Property Number	Property Description	Beginning Recoverables	Production	Ending Recoverables	Basis	Beginning Accum. Depletion	Adjusted Basis	Cost Depletion Rate	Cost Depletion	* Allowable Depletion	Ending Accum. Depletion	Reserved	Reserved
1	KKR & CO LP								16.	16.			
TOTALS									16.	16.			

* "Limited % Depletion" - has been limited to 65% of Taxable Income
 * "Allowable Depletion" - Greater of "Percentage Depletion" or "Cost Depletion" after calculation for the 65% taxable income limitations or "Non-Oil & Gas Depletion"
 * "Net Income for Excess IDC CALC" - has been reduced by "Allowable Depletion" and "Excess IDC" has been added back.
 * "Cost Depletion for 65% Limitation" - Used for computation of taxable income limitation statement for AMT

Total excess Intangible Drilling Cost 16.
 Less 65% of Net Income for Excess IDC Calculation 10.
 Excess Intangible Drilling Cost Preference 0.

1

Schedule of Mineral Interest Properties - Alternative Minimum Tax

Identifying Number **7218** Name **BRIAN S. STAVER**

AMT Income (from AMT Depletion Taxable Income Limitation Worksheet) **54,041.**
 65% of AMT Income **35,127.**

Property Number	Property Description	Gross Income	Royalty Paid	Severance Tax	Operating Expense	IDC Expense	Dry Hole Costs	Other Expenses	AMT Depreciation	AMT Amortization	(1) Overhead Expense	AMT Adjustment	Net Income Before Depreciation
1	KKR & CO LP	114.			72.	8.							34.
Totals		114.			72.	8.							34.

Property Number	Property Description	AMT % Depletion	AMT % Depl. Limited to Net Income	Daily Production (Barrel)	Quantity Limitation Rate	AMT % Depletion After Quantity Limit.	AMT Cost Depletion	AMT Prior Year % Depletion C/O	AMT Greater of Cost or % Depletion	AMT % Depletion 1st Iteration	Allocation Ratio	(2) AMT Limited % Depletion	AMT % Depletion Final Iteration
1	KKR & CO LP				1.00		16.		16.				
Totals							16.		16.				

Property Number	Property Description	Reallocation Ratio	(3) AMT Allowable Depletion	AMT % Depletion C/O	Begin Accum. IDC	(5) AMT Cost Depletion for 65% Limit	Reserved	Reserved	Reserved	Reserved	Reserved	Reserved	Reserved
1	KKR & CO LP		16.			16.							
Totals			16.			16.							

Property Number	Property Description	Beginning Recoverables	Production	Ending Recoverables	AMT Basis	Beginning AMT Accumulated Depletion	AMT Adjusted Basis	Cost Depletion Rate	AMT Cost Depletion	(4) AMT Allowable Depletion	(4) Regular Allowable Depletion	(4) AMT Depletion Adjustment	Ending AMT Accumulated Depletion
1	KKR & CO LP								16.	16.	16.	0.	
Totals									16.	16.	16.	0.	

(1) Includes overhead AMT depreciation
 (2) "Limited AMT % Depletion" - has been limited to 65% of AMT Income
 (3) "AMT Allowable Depletion" - Greater of "AMT Percentage Depletion" or "AMT Cost Depletion" after calculation for the 65% AMT income limitations.
 (4) AMT Depletion Adjustment is the difference between regular allowable depletion and AMT depletion.
 (5) "AMT Cost Depletion for 65% Limitation" - Used for computation of taxable income limitation statement for AMT

1

2017 DEPRECIATION AND AMORTIZATION REPORT

RESIDENTIAL PROPERTY -- 9261 N CONGRESS

SCHEDULE E - 1

Asset No.	Description	Date Acquired	Method	Life	Convention	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	BUILDING	07/01/16	SL	27.50	MM	17	63,559.				63,559.	1,059.		2,311.	3,370.
2	LAND	07/01/16	L		HY		24,363.				24,363.			0.	0.
TOTAL SCH E DEPRECIATION							87,922.				87,922.	1,059.		2,311.	3,370.

728111 04-01-17

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

Schedule E - Two-Year Comparison Worksheet

2017

Property Name:

RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW MARKET, VA 22

Description	Tax Year 2016	Tax Year 2017	Increase (Decrease)
<u>INCOME</u>			
RENTS RECEIVED	800.	1,400.	600.
<u>EXPENSES</u>			
REPAIRS	488.	1,300.	812.
TAXES	346.	413.	67.
SUBTOTAL	834.	1,713.	879.
DEPRECIATION EXPENSE OR DEPLETION	1,059.	2,311.	1,252.
TOTAL EXPENSES	1,893.	4,024.	2,131.
INCOME OR (LOSS)	-1,093.	-2,624.	-1,531.
DEDUCTIBLE RENTAL LOSS *	-1,093.	-2,624.	-1,531.
* INCLUDES PASSIVE ACTIVITY LOSS			

Foreign Tax Credit
 (Individual, Estate, or Trust)

OMB No. 1545-0121

2017
 Attachment
 Sequence No. **19**

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

Name **BRIAN S. & SHERRI JO STAVER** Identifying number as shown on page 1 of your tax return **██████████-7218**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a Passive category income
- b General category income
- c Section 901(j) income
- d Certain income re-sourced by treaty
- e Lump-sum distributions

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES CANADA				
1a Gross income from sources within country shown above and of the type checked above:				1a
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement) SEE STATEMENT 21		7,068.		
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction	24,916.	24,916.		
b Other deductions (attach statement)				
c Add lines 3a and 3b	24,916.	24,916.		
d Gross foreign source income				
e Gross income from all sources	83,520.	83,520.		
f Divide line 3d by line 3e	.00000	.00000		
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5		7,068.		6 7,068.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 -7,068.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued						(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
		In foreign currency			In U.S. dollars				
		(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties		
A									
B									
C									
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2									

LHA For Paperwork Reduction Act Notice, see instructions.

[Redacted]

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9		
10	Carryback or carryover (attach detailed computation)	10		
11	Add lines 9 and 10	11		
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	-7,068.	
16	Adjustments to line 15	16	7,068.	
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17		
18	Individuals: Enter the amount from Form 1040, line 41; or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		
20	Individuals: Enter the total of Form 1040, lines 44 and 46. If you are a nonresident alien, enter the total of Form 1040NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 36, 37, and 39. Foreign estates and trusts should enter the amount from Form 1040NR, line 42 Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.	20		553.
21	Multiply line 20 by line 19 (maximum amount of credit)	21		
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		

Part IV Summary of Credits From Separate Parts III

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28		0.
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 41a	30		0.



Foreign Tax Credit
 (Individual, Estate, or Trust)

OMB No. 1545-0121

2017
 Attachment
 Sequence No. 19

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

Name **BRIAN S. & SHERRI JO STAVER** Identifying number as shown on page 1 of your tax return **7218**

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a Passive category income
- b General category income
- c Section 901(j) income
- d Certain income re-sourced by treaty
- e Lump-sum distributions

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession ▶	CANADA	OTHER COUNTRIES		
1a Gross income from sources within country shown above and of the type checked above:		2,066.		1a 2,066.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement) SEE STATEMENT 23		28.		
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction	24,916.	24,916.		
b Other deductions (attach statement)				
c Add lines 3a and 3b	24,916.	24,916.		
d Gross foreign source income		2,066.		
e Gross income from all sources	83,520.	83,520.		
f Divide line 3d by line 3e	.00000	.02474		
g Multiply line 3c by line 3f		616.		
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5		644.		6 644.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 1,422.

Part II Foreign Taxes Paid or Accrued **SEE STATEMENT 22**

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued								
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:				Taxes withheld at source on:				
		(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties	(q) Interest	(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
A										
B						347.			2.	349.
C										
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2										8 349.

LHA For Paperwork Reduction Act Notice, see instructions. Form **1116** (2017)

[Redacted]

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	349.	
10	Carryback or carryover (attach detailed computation) SEE STATEMENT 24	10	141.	
11	Add lines 9 and 10	11	490.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		490.
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	1,422.	
16	Adjustments to line 15	16	-1,422.	
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17		
18	Individuals: Enter the amount from Form 1040, line 41; or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		
20	Individuals: Enter the total of Form 1040, lines 44 and 46. If you are a nonresident alien, enter the total of Form 1040NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 36, 37, and 39. Foreign estates and trusts should enter the amount from Form 1040NR, line 42 Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.	20		553.
21	Multiply line 20 by line 19 (maximum amount of credit)	21		
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		0.

Part IV Summary of Credits From Separate Parts III

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28		
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 41a	30		



General Business Credit

▶ 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.

BRIAN S. & SHERRI JO STAVER

Identifying number

7218

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	6.
3	Enter the applicable passive activity credits allowed for 2017. See instructions	3	0.
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	5	
6	Add lines 1, 3, 4, and 5	6	

Part II Allowable Credit

7	Regular tax before credits: <ul style="list-style-type: none"> 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	553.
8	Alternative minimum tax: <ul style="list-style-type: none"> 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	
9	Add lines 7 and 8	9	553.
10a	Foreign tax credit	10a	
b	Certain allowable credits (see instructions)	10b	75.
c	Add lines 10a and 10b	10c	75.
11	Net income tax. Subtract line 10c from line 9. If zero, skip lines 12 through 15 and enter -0- on line 16	11	478.
12	Net regular tax. Subtract line 10c from line 7. If zero or less, enter -0-	12	478.
13	Enter 25% (0.25) of the excess, if any, of line 12 over \$25,000 (see instructions)	13	
14	Tentative minimum tax: <ul style="list-style-type: none"> 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	
15	Enter the greater of line 13 or line 14	15	
16	Subtract line 15 from line 11. If zero or less, enter -0-	16	478.
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	0.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 3800 (2017)

General Information

Name: _____



Address: _____

City: _____

State: _____

Zip: _____

Phone: _____

Occupation: _____

Education: _____

Marital Status: _____

Number of Children: _____

Other: _____

Signature: _____

Date: _____

Print Name: _____

Print Address: _____

Print City: _____

Print State: _____

Print Zip: _____

Print Phone: _____

Print Occupation: _____

Print Education: _____

Print Marital Status: _____

Print Number of Children: _____

Print Other: _____

Print Signature: _____

Print Date: _____

Print Name: _____

Print Address: _____

Print City: _____

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	
19	Enter the greater of line 13 or line 18	19	
20	Subtract line 19 from line 11. If zero or less, enter -0-	20	
21	Subtract line 17 from line 20. If zero or less, enter -0-	21	
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	
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	478.
28	Add lines 17 and 26	28	
29	Subtract line 28 from line 27. If zero or less, enter -0-	29	478.
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	
33	Enter the applicable passive activity credits allowed for 2017. See instructions	33	
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	
37	Enter the smaller of line 29 or line 36	37	
38	Credit allowed for the current year. Add lines 28 and 37. 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. <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	

Name(s) shown on return

Identifying number

BRIAN S. & SHERRI JO STAVER

7218

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

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

Table with 3 columns: (a) Description of credit, (b) If claiming the credit from a pass-through entity, enter the EIN, (c) Enter the appropriate amount. Rows include various credit categories like Investment, Reserved, Research activities, etc.



Form **4797**

Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Sales of Business Property
(Also Involuntary Conversions and Recapture Amounts
Under Sections 179 and 280F(b)(2))
▶ Attach to your tax return.

▶ Go to www.irs.gov/Form4797 for instructions and the latest information.

OMB No. 1545-0184

2017

Attachment
Sequence No. **27**

BRIAN S. & SHERRI JO STAVER

Identifying number

[REDACTED] 7218

1 Enter the gross proceeds from sales or exchanges reported to you for 2017 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20

1

Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft—Most Property Held More Than 1 Year (see instructions)

2	(a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
	SEE STATEMENT 25						-214.

3	Gain, if any, from Form 4684, line 39	3
4	Section 1231 gain from installment sales from Form 6252, line 26 or 37	4
5	Section 1231 gain or (loss) from like-kind exchanges from Form 8824	5
6	Gain, if any, from line 32, from other than casualty or theft	6
7	Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows: Partnerships (except electing large partnerships) and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below. Individuals, partners, S corporation shareholders, and all others. If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you didn't have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.	7

-214.

8	Nonrecaptured net section 1231 losses from prior years. See instructions	8
9	Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return. See instructions	9

Part II Ordinary Gains and Losses (see instructions)

10	Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):	
	WILLIAMS PARTNERS LP VARIOUS 06/06/17 1,338.	1,338.

11	Loss, if any, from line 7	11	(214.)
12	Gain, if any, from line 7 or amount from line 8, if applicable	12	
13	Gain, if any, from line 31	13	
14	Net gain or (loss) from Form 4684, lines 31 and 38a	14	
15	Ordinary gain from installment sales from Form 6252, line 25 or 36	15	
16	Ordinary gain or (loss) from like-kind exchanges from Form 8824	16	
17	Combine lines 10 through 16	17	1,124.

18	For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below:		
a	If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the part of the loss from income-producing property on Schedule A (Form 1040), line 28, and the part of the loss from property used as an employee on Schedule A (Form 1040), line 23. Identify as from "Form 4797, line 18a." See instructions	18a	
b	Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Form 1040, line 14	18b	1,124.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2017)

* ENTIRE DISPOSITION OF ACTIVITY



Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property:		(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A			
B			
C			
D			
These columns relate to the properties on lines 19A through 19D.		Property A	Property B
		Property C	Property D
20	Gross sales price (Note: See line 1 before completing.)	20	
21	Cost or other basis plus expense of sale	21	
22	Depreciation (or depletion) allowed or allowable	22	
23	Adjusted basis. Subtract line 22 from line 21	23	
24	Total gain. Subtract line 23 from line 20	24	
25	If section 1245 property:		
a	Depreciation allowed or allowable from line 22	25a	
b	Enter the smaller of line 24 or 25a	25b	
26	If section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.		
a	Additional depreciation after 1975. See instructions	26a	
b	Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions	26b	
c	Subtract line 26a from line 24. If residential rental property or line 24 isn't more than line 26a, skip lines 26d and 26e	26c	
d	Additional depreciation after 1969 and before 1976	26d	
e	Enter the smaller of line 26c or 26d	26e	
f	Section 291 amount (corporations only)	26f	
g	Add lines 26b, 26e, and 26f	26g	
27	If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership (other than an electing large partnership).		
a	Soil, water, and land clearing expenses	27a	
b	Line 27a multiplied by applicable percentage	27b	
c	Enter the smaller of line 24 or 27b	27c	
28	If section 1254 property:		
a	Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions	28a	
b	Enter the smaller of line 24 or 28a	28b	
29	If section 1255 property:		
a	Applicable percentage of payments excluded from income under section 126. See instructions	29a	
b	Enter the smaller of line 24 or 29a. See instructions	29b	

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30	Total gains for all properties. Add property columns A through D, line 24	30	
31	Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32	Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

	(a) Section 179	(b) Section 280F(b)(2)
33	Section 179 expense deduction or depreciation allowable in prior years	33
34	Recomputed depreciation. See instructions	34
35	Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35



DOES NOT APPLY

Form 6251

Alternative Minimum Tax - Individuals

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service (99)

Go to www.irs.gov/Form6251 for instructions and the latest information.

2017 Attachment Sequence No. 32

Attach to Form 1040 or Form 1040NR.

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

BRIAN S. & SHERRI JO STAVER

7218

Part I Alternative Minimum Taxable Income

Table with 28 rows for Alternative Minimum Taxable Income. Line 1: 28,843. Line 3: 10,253. Line 5: 14,663. Line 6: 0. Line 17: -103. Line 19: 385. Line 28: 54,041.

Part II Alternative Minimum Tax (AMT)

Table for Alternative Minimum Tax (AMT) with 5 rows. Line 29: 84,500. Line 30: 0. Line 31: 0. Line 33: 0. Line 34: 553. Line 35: 0.

1950
1951
1952



Part III Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

Table with 2 columns: Line number and Description. Rows 36-64 detailing tax calculations for capital gains, including instructions for Form 1040 and Form 2555-EZ.



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ALTERNATIVE MINIMUM TAX RECONCILIATION REPORT

Name(s)

BRIAN S. & SHERRI JO STAVER

Social Security Number

2025 7218

Form Name	Description	Income	Adjustment				Form 6251 Other Adjustment
			Form 6251, Line 17	Form 6251, Line 18	Form 6251, Line 19	Form 6251, Line 20	
E-	WILLIAMS PARTNERS, LP - PTP						
	* REGULAR INCOME	-7,068.					
	AMT ADJUSTMENTS	409.			409.		
	* AMT NET INCOME	-6,659.					
E-	KKR & CO LP - PTP						
	* REGULAR INCOME	-6.					
	AMT ADJUSTMENTS	-24.			-24.		
	* AMT NET INCOME	-30.					
E-	RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, N						
	* REGULAR INCOME	-2,624.					
	* AMT NET INCOME	-2,624.					
	** TOTAL ADJ & PREF **				385.		

1

AMT Depletion Taxable Income Limitation for Independent Producers and Royalty Owners

Name **BRIAN S. & SHERRI JO STAVER**

SSN

7218

1. Adjusted regular taxable income:		
a	Adjusted total taxable income or loss (Form 6251, lines 1 through 8)	53,759.
b	Oil and gas depletion (regular tax)	16.
c	Net operating loss deduction included in line 1a above	
d	AMT cost depletion	16.
e	Adjusted regular taxable income. Combine lines 1a through 1d	53,759.
2. Alternative minimum taxable income (AMTI) before adjustments:		
a	Non-oil and gas AMT depletion adjustment	
b	Other AMT tax preference and adjustment items (without IDC)	282.
3.	AMTI for oil and gas limitation before AMT net operating loss deduction	54,041.
4.	AMT tentative % depletion deduction before ATNOLD (65% of line 3) (carries to ATNOLD worksheet)	
5.	AMTI after tentative % depletion deduction. Subtract line 4 from line 3	
6.	ATNOLD available (from ATNOLD worksheet)	
7.	AMTI after ATNOLD for oil and gas depletion limitation. Subtract line 6 from line 3	54,041.

AMT Tentative Depletion for ATNOLD

1.	Oil and gas depletion (regular tax)	
2.	AMT cost depletion	
3.	AMT tentative % depletion	
4.	Tentative AMT depletion adjustment	
5.	Non-oil gas AMT depletion adjustment	
6.	Total AMT depletion adjustment for "Worksheet for ATNOLD Carryover"	

ALTERNATIVE MINIMUM TAX DEPRECIATION REPORT

Asset No.	Description	Date Acquired	AMT Method	AMT Life	AMT Cost Or Basis	AMT Accumulated	Regular Depreciation	AMT Depreciation	AMT Adjustment
	RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW BUILDING	07/01/65L		27.50	63,559.	1,059.	2,311.	2,311.	0.
	** SUBTOTAL **				63,559.	1,059.	2,311.	2,311.	0.
	*** GRAND TOTAL ***				63,559.	1,059.	2,311.	2,311.	0.

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

ALTERNATIVE MINIMUM TAX
Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

OMB No. 1545-0121

2017

Attachment
Sequence No. 19

Name **BRIAN S. & SHERRI JO STAVER** Identifying number as shown on page 1 of your tax return **7218**

BRIAN S. & SHERRI JO STAVER

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a Passive category income
- b General category income
- c Section 901(j) income
- d Certain income re-sourced by treaty
- e Lump-sum distributions

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	OTHER COUNTRIES CANADA			
1a Gross income from sources within country shown above and of the type checked above:				1a
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) <input type="checkbox"/>				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)		7,068.		
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income				
e Gross income from all sources	83,417.	83,417.		
f Divide line 3d by line 3e	.00000	.00000		
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5		7,068.		6 7,068.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 -7,068.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued							
		In foreign currency				In U.S. dollars			
		Taxes withheld at source on:				(n) Other foreign taxes paid or accrued	Taxes withheld at source on:		
(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(o) Dividends	(p) Rents and royalties	(q) Interest			
A									
B									
C									

8 Add lines A through C, column (s). Enter the total here and on line 9, page 2 **8**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2017)

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ALTERNATIVE MINIMUM TAX

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9		
10	Carryback or carryover (attach detailed computation)	10		
11	Add lines 9 and 10	11		
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	-7,068.	
16	Adjustments to line 15	16	7,068.	
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17		
18	Individuals: Enter the amount from Form 1040, line 41; or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		
20	Individuals: Enter the total of Form 1040, lines 44 and 46. If you are a nonresident alien, enter the total of Form 1040NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 36, 37, and 39. Foreign estates and trusts should enter the amount from Form 1040NR, line 42 Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.	20		
21	Multiply line 20 by line 19 (maximum amount of credit)	21		
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		

Part IV Summary of Credits From Separate Parts III

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28		0.
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 41a	30		0.



**ALTERNATIVE MINIMUM TAX
Foreign Tax Credit**

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

Name **BRIAN S. & SHERRI JO STAVER** Identifying number as shown on page 1 of your tax return **[REDACTED]-7218**

BRIAN S. & SHERRI JO STAVER

Use a separate Form 1116 for each category of income listed below. See *Categories of Income* in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a Passive category income c Section 901(j) income e Lump-sum distributions
b General category income d Certain income re-sourced by treaty

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	CANADA	OTHER COUNTRIES		
1a Gross income from sources within country shown above and of the type checked above:		2,066.		1a 2,066.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions)				
Deductions and losses (Caution: See instructions.):				
2 Expenses definitely related to the income on line 1a (attach statement)		28.		
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income		2,066.		
e Gross income from all sources	83,417.	83,417.		
f Divide line 3d by line 3e	.00000	.02477		
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5		28.		6 28.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 2,038.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued						(s) Total foreign taxes paid or accrued (add cols. (o) through (r))			
		In foreign currency			In U.S. dollars						
		Taxes withheld at source on:			Taxes withheld at source on:						
		(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties	(q) Interest	(r) Other foreign taxes paid or accrued	
A											
B							347.			2.	349.
C											
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2											8 349.

LHA For Paperwork Reduction Act Notice, see instructions.

1105



ALTERNATIVE MINIMUM TAX

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	349.	
10	Carryback or carryover (attach detailed computation) SEE STATEMENT 28	10	265.	
11	Add lines 9 and 10	11	614.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		614.
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	2,038.	
16	Adjustments to line 15	16	-2,038.	
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17		
18	Individuals: Enter the amount from Form 1040, line 41; or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.	18		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		
20	Individuals: Enter the total of Form 1040, lines 44 and 46. If you are a nonresident alien, enter the total of Form 1040NR, lines 42 and 44. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, lines 36, 37, and 39. Foreign estates and trusts should enter the amount from Form 1040NR, line 42 Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.	20		
21	Multiply line 20 by line 19 (maximum amount of credit)	21		
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		0.

Part IV Summary of Credits From Separate Parts III

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28		
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit. Enter here and on Form 1040, line 48; Form 1040NR, line 46; Form 1041, Schedule G, line 2a; or Form 990-T, line 41a	30		



Investment Interest Expense Deduction

Department of the Treasury
Internal Revenue Service (99)

▶ Go to www.irs.gov/Form4952 for the latest information.
▶ Attach to your tax return.

2017
Attachment
Sequence No. **51**

Name(s) shown on return

Identifying number

BRIAN S. & SHERRI JO STAVER

[REDACTED]-7218

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2017 (see instructions)	SEE STATEMENT 29	1	143.
2	Disallowed investment interest expense from 2016 Form 4952, line 7		2	
3	Total investment interest expense. Add lines 1 and 2		3	143.

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment)	STMT 30	4a	44,973.
b	Qualified dividends included on line 4a		4b	15,223.
c	Subtract line 4b from line 4a		4c	29,750.
d	Net gain from the disposition of property held for investment		4d	
e	Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment (see instructions)		4e	
f	Subtract line 4e from line 4d		4f	
g	Enter the amount from lines 4b and 4e that you elect to include in investment income (see instructions)		4g	
h	Investment income. Add lines 4c, 4f, and 4g		4h	29,750.
5	Investment expenses (see instructions)	SEE STATEMENT 31	5	14,665.
6	Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0-		6	15,085.

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2018. Subtract line 6 from line 3. If zero or less, enter -0-		7	0.
8	Investment interest expense deduction. Enter the smaller of line 3 or 6. See instructions	STMT 32	8	143.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4952** (2017)



ALTERNATIVE MINIMUM TAX

Form **4952**

Investment Interest Expense Deduction

OMB No. 1545-0191

Department of the Treasury
Internal Revenue Service (99)

▶ Go to www.irs.gov/Form4952 for the latest information.
▶ Attach to your tax return.

2017
Attachment
Sequence No. **51**

Name(s) shown on return

Identifying number

BRIAN S. & SHERRI JO STAVER

7218

Part I Total Investment Interest Expense

1	Investment interest expense paid or accrued in 2017 (see instructions)	SEE STATEMENT 33	1	143.
2	Disallowed investment interest expense from 2016 Form 4952, line 7		2	
3	Total investment interest expense. Add lines 1 and 2		3	143.

Part II Net Investment Income

4a	Gross income from property held for investment (excluding any net gain from the disposition of property held for investment)	4a	44,973.	
b	Qualified dividends included on line 4a	4b	15,223.	
c	Subtract line 4b from line 4a			4c 29,750.
d	Net gain from the disposition of property held for investment	4d		
e	Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment (see instructions)	4e		
f	Subtract line 4e from line 4d			4f
g	Enter the amount from lines 4b and 4e that you elect to include in investment income (see instructions)			4g
h	Investment income. Add lines 4c, 4f, and 4g			4h 29,750.
5	Investment expenses (see instructions)			5 2.
6	Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0-			6 29,748.

Part III Investment Interest Expense Deduction

7	Disallowed investment interest expense to be carried forward to 2018. Subtract line 6 from line 3. If zero or less, enter -0-	7	0.
8	Investment interest expense deduction. Enter the smaller of line 3 or 6. See instructions	8	143.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4952** (2017)

REGULAR FORM 4952, LINE 8 143.
LESS RECOMPUTED FORM 4952, LINE 8 143.
INTEREST ADJUSTMENT - FORM 6251, LINE 8

Credit for Qualified Retirement Savings Contributions

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

▶ Go to www.irs.gov/Form8880 for instructions and the latest information.

Name(s) shown on return

Your social security number

BRIAN S. & SHERRI JO STAVER

[REDACTED]-7218



You **cannot** take this credit if **either** of the following applies.

- The amount on Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37 is more than \$31,000 (\$46,500 if head of household; \$62,000 if married filing jointly).
- The person(s) who made the qualified contribution or elective deferral (a) was born after January 1, 2000, (b) is claimed as a dependent on someone else's 2017 tax return, or (c) was a student (see instructions).

- Traditional and Roth IRA (including *myRA*) contributions for 2017. Do not include rollover contributions
- Elective deferrals to a 401(k) or other qualified employer plan, voluntary employee contributions, and 501(c)(18)(D) plan contributions for 2017 (see instructions)
- Add lines 1 and 2
- Certain distributions received **after** 2014 and **before** the due date (including extensions) of your 2017 tax return (see instructions). If married filing jointly, include **both** spouses' amounts in **both** columns. See instructions for an exception
- Subtract line 4 from line 3. If zero or less, enter -0-
- In each column, enter the **smaller** of line 5 or \$2,000
- Add the amounts on line 6. If zero, **stop**; you cannot take this credit
- Enter the amount from Form 1040, line 38*; Form 1040A, line 22; or Form 1040NR, line 37
- Enter the applicable decimal amount shown below.

	(a) You	(b) Your spouse
1		
2		745.
3		745.
4		
5		745.
6		745.
7		745.
8	61,412.	

If line 8 is -		And your filing status is -		
Over -	But not over -	Married filing jointly	Head of household	Single, Married filing separately, or Qualifying widow(er)
Enter on line 9 -				
---	\$18,500	.5	.5	.5
\$18,500	\$20,000	.5	.5	.2
\$20,000	\$27,750	.5	.5	.1
\$27,750	\$30,000	.5	.2	.1
\$30,000	\$31,000	.5	.1	.1
\$31,000	\$37,000	.5	.1	.0
\$37,000	\$40,000	.2	.1	.0
\$40,000	\$46,500	.1	.1	.0
\$46,500	\$62,000	.1	.0	.0
\$62,000	---	.0	.0	.0

Note: If line 9 is zero, **stop**; you cannot take this credit.

- Multiply line 7 by line 9
- Limitation based on tax liability. Enter the amount from the Credit Limit Worksheet in the instructions **SEE STATEMENT 34**
- Credit for qualified retirement savings contributions. Enter the smaller of line 10 or line 11 here and on Form 1040, line 51; Form 1040A, line 34; or Form 1040NR, line 48

9	X .1
10	75.
11	553.
12	75.

*See Pub. 590-A for the amount to enter if you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico.



Shared Responsibility Payment

721636 12-26-17

To Figure Your Shared Responsibility Payment

- Follow Steps 1 through 5 next.
- Complete Worksheet A or Worksheet B if you are directed to them as you complete Steps 1 through 5.
- Complete the Shared Responsibility Payment Worksheet as directed by Steps 1 through 5 or Worksheets A and B.

Step 1 All Filers

- Can someone claim you as a dependent?
 - Yes. Stop. You don't owe a shared responsibility payment. Don't check the box on line 6a of Form 1040 or Form 1040A. If you file Form 1040EZ, check the box on line 5
 - No. Continue to line 2
- Did you, and everyone else in your tax household (see Tax household under Definitions, earlier) have qualifying health coverage for every month of 2017*?
 - Yes. Stop. You don't owe a shared responsibility payment. Check the Full-year coverage box on Form 1040, line 61, Form 1040A, line 38, or Form 1040EZ, line 11
 - No. Continue to line 3

*You can check the Full-year coverage box if you had or adopted a child during the year, or a member of your tax household died during the year, as long as that person had qualifying health care coverage for every month he or she was a member of your tax household.
- Did you or anyone else in your tax household have qualifying health coverage or qualify for a coverage exemption for any month in 2017?
 - Yes. Stop. Claim any coverage exemption you qualify for on Form 8965. Skip question 4; go to Worksheet A
 - No. Continue to line 4
- Did you, or anyone else in your tax household turn 18 during 2017?
 - Yes. Go to Worksheet A
 - No. Go to Step 2

Step 2 Flat Dollar Amount

- Multiply \$695 by the number of people in your tax household who were at least 18 years old* 1 _____
*For purposes of figuring the shared responsibility payment, an individual is considered under age 18 for an entire month if he or she didn't turn 18 before the first day of the month. An individual turns 18 on the anniversary of the day the individual was born.
- Multiply \$347.50 by the number of people in your tax household who were under age 18 2 _____
- Add lines 1 and 2 3 _____
- Enter the smaller of line 3 or \$2,085 here and on line 1 of the Shared Responsibility Payment Worksheet. Go to Step 3 4 _____

Step 3 Household Income

- Enter the amount from Form 1040, line 38; Form 1040A, line 21; or Form 1040EZ, line 4 1 _____
- Did you receive any tax-exempt interest?
 - Yes. Enter the amount from Form 1040, line 8b; Form 1040A, line 8b; or the amount entered in the space to the left of Form 1040EZ, line 2 2 _____
 - No. Continue to line 3
- Did you attach Form 2555 or Form 2555-EZ?
 - Yes. Enter the amount from Form 2555, lines 45 and 50; or Form 2555-EZ, line 18 3 _____
 - No. Continue to line 4
- Did you claim any dependents?
 - Yes. Continue to line 5
 - No. Stop. Add lines 1 through 3. **This is your household income.** Enter the result on Step 4, line 1
- Were any of the dependents you claimed required to file a return?
 - Yes. Complete questions 1 through 3 for each dependent with a filing requirement for whom you didn't attach Form 8814. Enter the total here 5 _____
 - No. Add lines 1 through 3. **This is your household income.** Enter the result on Step 4, line 1
- Did you attach Form 8814?
 - Yes. Continue to line 7
 - No. Stop. Add lines 1, 2, 3, and 5. **This is your household income.** Enter the result on Step 4, line 1
- Is Form 8814, line 4, more than \$1,050?
 - Yes. Add the amount from Form 8814, line 1b, and the smaller of Form 8814, line 4 or 5 7 _____
 - No. Enter -0-. Continue to line 8
- Add lines 1, 2, 3, 5, and 7. **This is your household income.** Enter the result on Step 4, line 1 8 _____

Shared Responsibility Payment continued

Step 4 Percentage Income Amount

1. Enter your household income from Step 3 1 _____
2. Were you or your spouse (if filing jointly) born before January 2, 1953?
 - Yes. Skip question 3. Find your filing threshold on the **Filing Thresholds for Most People** chart and enter it both here and on line 4. 2 _____
 - No. Go to question 3.
3. Enter the amount listed below for your filing status. 3 _____
 - Single - \$10,400
 - Head of household - \$13,400
 - Married filing jointly - \$20,800
 - Married filing separately - \$4,050
 - Qualifying widow(er) - \$16,750
4. Enter the amount from line 2 or 3. 4 _____
5. Subtract line 4 from line 1 5 _____
6. Is the amount on line 5 zero or less?
 - Yes. Stop. You don't owe a shared responsibility payment. Complete Form 8965 by checking the box on line 7.
 - No. Continue to line 7.
7. Multiply line 5 by 2.5% (0.025). This is your percentage income amount 7 _____
8. Were you required to complete Worksheet A?
 - Yes. Go to Worksheet B. Then continue to Step 5
 - No. Enter the amount from line 7 above on line 2 of the Shared Responsibility Payment Worksheet and complete line 3 of that worksheet. Then continue to Step 5.

Step 5 National Average Bronze Plan Premium

1. Were you required to complete Worksheet A?
 - Yes. Continue to line 2
 - No. Skip question 2; Go to question 3.
2. Multiply \$272* by the number on Worksheet A, line 8. Enter the result here and on line 4 of the Shared Responsibility Payment Worksheet. Skip question 3 and complete line 5 of the Shared Responsibility Payment Worksheet 2 _____

*\$272 is the 2017 national average premium for a bronze level health plan available through the Marketplace for one individual for one month.
3. Enter on line 4 of the Shared Responsibility Payment Worksheet, the amount below that corresponds to the total number of people in your tax household. Then complete line 5 of the Shared Responsibility Payment Worksheet.
 - 1 person - \$3,264
 - 2 people - \$6,528
 - 3 people - \$9,792
 - 4 people - \$13,056
 - 5 or more people - \$16,320

Shared Responsibility Payment Worksheet

Use this worksheet if you are referred here from the Shared Responsibility Payment flowchart or from Worksheet A or B. If everyone in your tax household had either minimum essential coverage or a coverage exemption for every month during 2017, stop here. You don't owe a shared responsibility payment.

Complete Step 1	
1. Enter the flat dollar amount. (From Step 2, question 4 or Worksheet A, line 7)	1 _____
Complete Step 3	
2. Enter the percentage income amount. (From Step 4, question 7 or Worksheet B, line 14)	2 _____
3. Enter the larger of line 1 or line 2	3 _____
Complete Step 5	
4. Enter the National Average Bronze Plan Premium (From Step 5, question 2 or 3)	4 _____
5. Enter the smaller of line 3 or line 4 here and on Form 1040, line 61; Form 1040A, line 38; or Form 1040EZ, line 11.	5 _____
This is your shared responsibility payment	5 _____

721637 12-26-17

**Gains and Losses From Section 1256
 Contracts and Straddles**
 ▶ Go to www.irs.gov/Form6781 for the latest information.
 ▶ Attach to your tax return.

Name(s) shown on tax return: **BRIAN S. & SHERRI JO STAVER**
 Identifying number: **7218**

Check all applicable boxes: A Mixed straddle election C Mixed straddle account election
 (see instructions). B Straddle-by-straddle identification election D Net section 1256 contracts loss election

Part I Section 1256 Contracts Marked to Market

(a) Identification of account	(b) (Loss)	(c) Gain
1 FROM K-1 - KKR & CO LP	2.	
2 Add the amounts on line 1 in columns (b) and (c)	2 (2.)	
3 Net gain or (loss). Combine line 2, columns (b) and (c)		3 -2.
4 Form 1099-B adjustments. See instructions and attach statement		4
5 Combine lines 3 and 4		5 -2.
Note: If line 5 shows a net gain, skip line 6 and enter the gain on line 7. Partnerships and S corporations, see instructions.		
6 If you have a net section 1256 contracts loss and checked box D above, enter the amount of loss to be carried back. Enter the loss as a positive number. If you didn't check box D, enter -0-		6
7 Combine lines 5 and 6		7 -2.
8 Short-term capital gain or (loss). Multiply line 7 by 40% (0.40). Enter here and include on line 4 of Schedule D or on Form 8949 (see instructions)		8 -1.
9 Long-term capital gain or (loss). Multiply line 7 by 60% (0.60). Enter here and include on line 11 of Schedule D or on Form 8949 (see instructions)		9 -1.

Part II Gains and Losses From Straddles. Attach a separate statement listing each straddle and its components.

Section A - Losses From Straddles

(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Loss. If column (e) is more than (d), enter difference. Otherwise, enter -0-	(g) Unrecognized gain on offsetting positions	(h) Recognized loss. If column (f) is more than (g), enter difference. Otherwise, enter -0-
	Mo. Day Yr.						
10							

11 a Enter the short-term portion of losses from line 10, column (h), here and include on line 4 of Schedule D or on Form 8949 (see instructions) **11a** ()
 b Enter the long-term portion of losses from line 10, column (h), here and include on line 11 of Schedule D or on Form 8949 (see instructions) **11b** ()

Section B - Gains From Straddles

(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Gain. If column (d) is more than (e), enter difference. Otherwise, enter -0-
	Mo. Day Yr.				
12					

13 a Enter the short-term portion of gains from line 12, column (f), here and include on line 4 of Schedule D or on Form 8949 (see instructions) **13a**
 b Enter the long-term portion of gains from line 12, column (f), here and include on line 11 of Schedule D or on Form 8949 (see instructions) **13b**

Part III Unrecognized Gains From Positions Held on Last Day of Tax Year. Memo Entry Only (see instructions)

(a) Description of property	(b) Date acquired			(c) Fair market value on last business day of tax year	(d) Cost or other basis as adjusted	(e) Unrecognized gain. If column (c) is more than (d), enter difference. Otherwise, enter -0-
	Mo.	Day	Yr.			
14						

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Passive Activity Loss Limitations

▶ See separate instructions.

▶ Attach to Form 1040 or Form 1041.

▶ Go to www.irs.gov/Form8582 for instructions and the latest information.

Name(s) shown on return

Identifying number

BRIAN S. & SHERRI JO STAVER

██████████-7218

Part I 2017 Passive Activity Loss Caution: Complete Worksheets 1, 2, and 3 before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see **Special Allowance for Rental Real Estate Activities** in the instructions.)

1a	Activities with net income (enter the amount from Worksheet 1, column (a))	1a		
1b	Activities with net loss (enter the amount from Worksheet 1, column (b))	1b	(2,624.)	
1c	Prior years' unallowed losses (enter the amount from Worksheet 1, column (c))	1c	()	
1d	Combine lines 1a, 1b, and 1c	1d		-2,624.

Commercial Revitalization Deductions From Rental Real Estate Activities

2a	Commercial revitalization deductions from Worksheet 2, column (a)	2a	()	
2b	Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b	()	
2c	Add lines 2a and 2b	2c	()	

All Other Passive Activities

3a	Activities with net income (enter the amount from Worksheet 3, column (a))	3a		
3b	Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	()	
3c	Prior years' unallowed losses (enter the amount from Worksheet 3, column (c))	3c	()	
3d	Combine lines 3a, 3b, and 3c	3d		

4	Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used	4		-2,624.
---	---	---	--	---------

- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
 - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II or Part III. Instead, go to line 15.

Part II Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

5	Enter the smaller of the loss on line 1d or the loss on line 4	5		2,624.
6	Enter \$150,000. If married filing separately, see instructions	6	150,000.	
7	Enter modified adjusted gross income, but not less than zero (see instructions)	7	64,038.	
8	Subtract line 7 from line 6	8	85,962.	
9	Multiply line 8 by 50% (0.50). Do not enter more than \$25,000. If married filing separately, see instructions	9		25,000.
10	Enter the smaller of line 5 or line 9	10		2,624.

Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.

11	Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11		
12	Enter the loss from line 4	12		
13	Reduce line 12 by the amount on line 10	13		
14	Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13	14		

Part IV Total Losses Allowed

15	Add the income, if any, on lines 1a and 3a and enter the total	15		
16	Total losses allowed from all passive activities for 2017. Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16	SEE STATEMENT 38	2,624.



Caution: The worksheets must be filed with your tax return. Keep a copy for your records.

Worksheet 1 - For Form 8582, Lines 1a, 1b, and 1c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 1					
Total. Enter on Form 8582, lines 1a, 1b, and 1c		-2,624.			

Worksheet 2 - For Form 8582, Lines 2a and 2b (See instructions.)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b			

Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 3a, 3b, and 3c					

Worksheet 4 - Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
SEE ATTACHED STATEMENT FOR WORKSHEET 4					
Total		2,624.	1.0000000	2,624.	0.

Worksheet 5 - Allocation of Unallowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Total				



Worksheet 6 - Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 6				
Total		2,624.	0.	2,624.

Worksheet 7 - Activities With Losses Reported on Two or More Forms or Schedules (See instructions.)

Name of activity:	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Total					



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Passive Activity Credit Limitations for Publicly Traded Partnerships

Name BRIAN S. & SHERRI JO STAVER 7218

I Rehabilitation Credits From Rental Real Estate Activities and Low-Income Housing Credits for Property Placed in Service Before 1990

1a. Current year credits _____
 b. Prior year unallowed credits _____
 c. Add lines 1a and 1b _____

II Low-Income Housing Credits

2a. Current year credits _____
 b. Prior year unallowed credits _____
 c. Add lines 2a and 2b _____

III All Other Passive Activity Credits

3a. Current year credits _____ 6.
 b. Prior year unallowed credits _____
 c. Add lines 3a and 3b _____ SEE STATEMENT 42 6.
 4. Total credits allowed by tax attributable to PTPs _____

IV Special Allowance for Rehabilitation Credits from Rental Real Estate Activities and Low-Income Housing Credits for Property Placed in Service Before 1990

5. Remaining credits after reducing by tax attributable to income from PTP _____
 6. Enter \$250,000. If married filing separately, see page 12. _____
 7. Enter modified adjusted gross income, but not less than zero
 If line 7 is equal to or more than line 6, skip lines 8 through 14 and enter -0- on line 15 _____
 8. Subtract line 7 from line 6 _____
 9. Multiply line 8 by 50% (.50). Do not enter more than \$25,000 _____
 10. Enter the amounts, if any, from lines 10 and 14 of Form 8582 _____
 11. Subtract line 10 from line 9 _____
 12. Enter the tax attributable to the amount on line 11 (see page 12) _____
 13. Add Form 8582-CR, lines 16, 30 and 36 _____
 14. Subtract line 13 from line 12 _____
 15. Enter the **smaller** of line 5 or line 14 _____

V Special Allowance for Low-Income Housing Credits

16. Remaining credits after reducing by tax attributable to income from PTP _____
 17. Taxable income _____
 18. Tax on line 17 _____
 19. Enter \$25,000 (\$12,500 if married filing separate return and you and your spouse lived apart at all times during the year) _____
 20. Enter the amounts, if any, from lines 10 and 14 of Form 8582 _____
 21. Subtract line 20 from line 19 _____
 22. Subtract line 21 from line 17 _____
 23. Tax on line 22 _____
 24. Subtract line 23 from line 18 _____
 25. Add line 15 and Form 8582-CR, lines 16, 30 and 36 _____
 26. Tax attributable to the remaining special allowance.
 Subtract line 25 from line 24 _____
 27. Smaller of line 16 or line 26 _____
 28. Total credits allowed. Add lines 4, 15 and 27 _____



Domestic Production Activities Deduction

OMB No. 1545-1984

▶ Attach to your tax return. ▶ See separate instructions.

Attachment
 Sequence No. 143

Name(s) as shown on return

Identifying number

BRIAN S. & SHERRI JO STAVER

██████████ 7218

	(a) Oil-related production activities	(b) All activities
Note. Do not complete column (a), unless you have oil-related production activities. Enter amounts for all activities in column (b), including oil-related production activities.		
1 Domestic production gross receipts (DPGR)	142.	262.
2 Allocable cost of goods sold. If you are using the small business simplified overall method, skip lines 2 and 3 SEE STATEMENT 43	2	88.
3 Enter deductions and losses allocable to DPGR (see instructions) STMT 44	188.	120.
4 If you are using the small business simplified overall method, enter the amount of cost of goods sold and other deductions or losses you ratably apportion to DPGR. All others, skip line 4	4	
5 Add lines 2 through 4	188.	208.
6 Subtract line 5 from line 1	-46.	54.
7 Qualified production activities income from estates, trusts, and certain partnerships and S corporations (see instructions)	7	
8 Add lines 6 and 7. Estates and trusts, go to line 9, all others, skip line 9 and go to line 10	-46.	54.
9 Amount allocated to beneficiaries of the estate or trust (see instructions)	9	
10a Oil-related qualified production activities income. Estates and trusts, subtract line 9, column (a), from line 8, column (a), all others, enter amount from line 8, column (a). If zero or less, enter -0- here	0.	
b Qualified production activities income. Estates and trusts, subtract line 9, column (b), from line 8, column (b), all others, enter amount from line 8, column (b). If zero or less, enter -0- here, skip lines 11 through 21, and enter -0- on line 22	10b	54.
11 Income limitation (see instructions):		
• Individuals, estates, and trusts. Enter your adjusted gross income figured without the domestic production activities deduction	}	11 61,414.
• All others. Enter your taxable income figured without the domestic production activities deduction (tax-exempt organizations, see instructions)		
12 Enter the smaller of line 10b or line 11. If zero or less, enter -0- here, skip lines 13 through 21, and enter -0- on line 22	12	54.
13 Enter 9% of line 12	13	5.
14a Enter the smaller of line 10a or line 12	14a	
b Reduction for oil-related qualified production activities income. Multiply line 14a by 3%	14b	
15 Subtract line 14b from line 13	15	5.
16 Form W-2 wages (see instructions)	16	4.
17 Form W-2 wages from estates, trusts, and certain partnerships and S corporations (see instructions)	17	
18 Add lines 16 and 17. Estates and trusts, go to line 19, all others, skip line 19 and go to line 20	18	4.
19 Amount allocated to beneficiaries of the estate or trust (see instructions)	19	
20 Estates and trusts, subtract line 19 from line 18, all others, enter amount from line 18	20	4.
21 Form W-2 wage limitation. Enter 50% of line 20	21	2.
22 Enter the smaller of line 15 or line 21	22	2.
23 Domestic production activities deduction from cooperatives. Enter deduction from Form 1099-PATR, box 6	23	
24 Expanded affiliated group allocation (see instructions)	24	
25 Domestic production activities deduction. Combine lines 22 through 24 and enter the result here and on Form 1040, line 35; Form 1120, line 25; or the applicable line of your return	25	2.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **8903** (Rev. 12-2010)

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Form 1116

U.S. and Foreign Source Income Summary

NAME

BRIAN S. & SHERRI JO STAVER

7218

INCOME TYPE	TOTAL	U.S.	FOREIGN	
			GENERAL	PASSIVE
Compensation	28,007.	28,007.		
Dividends/Distributions	STMT 45 15,747.	13,961.		1,786.
Interest	29,214.	29,214.		
Capital Gains	7,450.	7,450.		
Business/Profession				
Rent/Royalty	1,416.	1,400.		16.
State/Local Refunds				
Partnership/S Corporation	STMT 46 558.	294.		264.
Trust/Estate				
Other Income	1,128.	1,128.		
Gross Income	83,520.	81,454.		2,066.
Less:				
Section 911 Exclusion				
Capital Losses	10,450.	10,450.		
Capital Gains Tax Adjustment				
Total Income - Form 1116	73,070.	71,004.		2,066.
Deductions:				
Business/Profession Expenses	562.	536.		26.
Rent/Royalty Expenses	4,026.	4,024.		2.
Partnership/S Corporation Losses	7,068.		7,068.	
Trust/Estate Losses				
Capital Losses				
Non-capital Losses				
Individual Retirement Account				
Moving Expenses				
Self-employment Tax Deduction				
Self-employment Health Insurance				
Keogh Contributions				
Alimony				
Forfeited Interest				
Foreign Housing Deduction				
Other Adjustments	2.	2.		
Capital Gains Tax Adjustment				
Total Deductions	11,658.	4,562.	7,068.	28.
Adjusted Gross Income	61,412.	66,442.	-7,068.	2,038.
Less Itemized Deductions:				
Specifically Allocated	204.	204.		
Home Mortgage Interest	7,306.	7,306.		
Other Interest	143.	143.		
Ratably Allocated	24,916.	24,300.		616.
Total Adjustments to Adjusted Gross Income	32,569.	31,953.		616.
Taxable Income Before Exemptions	28,843.	34,489.	-7,068.	1,422.

727901 04-01-17



Form 1116

Allocation of Itemized Deductions

NAME

BRIAN S. & SHERRI JO STAVER

7218

	Total Itemized Deductions	Itemized Deductions After Sec. 68 Reduction	Form 1116		
			Specifically U.S.	Specifically Foreign	Ratable
Taxes	10,253.	10,253.			10,253.
Interest - Not Including Investment Interest	7,306.	7,306.	7,306.		
Contributions	204.	204.	204.		
Miscellaneous Deductions Subject to 2%	14,663.	14,663.			14,663.
Other Miscellaneous Deductions - Not Including Gambling Losses					
Foreign Adjustment					
Total Itemized Deductions Subject to Sec. 68	32,426.	32,426.			
Add Itemized Deductions Not Subject to Sec. 68:					
Medical/Dental					
Investment Interest	143.	143.	143.		
Casualty Losses					
Gambling Losses					
Qualified contributions					
Foreign Adjustment					
Total Itemized Deductions	32,569.				
Total Allowed on Schedule A		32,569.	7,653.		24,916.



NAME

BRIAN S. & SHERRI JO STAVER

7218

Foreign Income Category

PASSIVE INCOME

Regular	2012	2013	2014	2015	2016	2017
1. Foreign tax paid/accrued						349.
2. FTC carryback to 2017 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						349.
5. Maximum credit allowable						0.
6. Unused foreign tax (+) or excess of limit (-)					141.	349.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					141.	349.
Total foreign taxes from all available years to be carried to next year						490.

	2007	2008	2009	2010	2011
1. Foreign tax paid/accrued					
2. FTC carryback to 2017 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax (+) or excess of limit (-)					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					

100

NAME

BRIAN S. & SHERRI JO STAVER

7218

Foreign Income Category

PASSIVE INCOME

AMT	2012	2013	2014	2015	2016	2017
1. Foreign tax paid/accrued						349.
2. FTC carryback to 2017 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						349.
5. Maximum credit allowable						0.
6. Unused foreign tax (+) or excess of limit (-)					265.	349.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					265.	349.
Total foreign taxes from all available years to be carried to next year						614.

	2007	2008	2009	2010	2011
1. Foreign tax paid/accrued					
2. FTC carryback to 2017 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax (+) or excess of limit (-)					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					



Form 1116

Pro Rata Share of Allocated Losses

NAME

BRIAN S. & SHERRI JO STAVER

-7218

Allocation of Losses from Other Categories

INCOME CLASSIFICATION	INCOME	LOSS	ALLOCATED LOSS	LOSS NOT ALLOCATED
Passive income	1,422.		1,422.	
Income re-sourced by treaty				
General limitation income		7,068.		5,646.
Totals	1,422.	7,068.	1,422.	5,646.

Allocation of U.S. Losses

INCOME CLASSIFICATION	REMAINING INCOME	U.S. LOSS	ALLOCATED LOSS	LOSS NOT ALLOCATED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Recapture of Prior Year Overall Foreign Loss

INCOME CLASSIFICATION	REMAINING INCOME	OVERALL PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				
Recapture percentage				

Recapture of Separate Limitation Loss Accounts

INCOME CLASSIFICATION	REMAINING INCOME	PRIOR YEAR LOSS	RECHARACTERIZED LOSS	LOSS NOT RECHARACTERIZED
Passive income				
Income re-sourced by treaty				
General limitation income		160.		160.
Totals		160.		160.

Recapture of Overall Domestic Loss Prior to 2012

INCOME CLASSIFICATION	U.S. TAXABLE INCOME LIMIT	PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Recapture of Overall Domestic Loss

INCOME CLASSIFICATION	U.S. TAXABLE INCOME LIMIT	PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Adjustments to Form 1116, Line 15

INC. CLASSIFICATION	OTHER CATEGORIES	U.S. LOSSES	PRIOR YEAR OVERALL	RECAPTURE OF LOSS ACCOUNTS	DOMESTIC RECAPTURE	FORM 1116, LINE 16
Passive	-1,422.					-1,422.
Re-sourced by treaty						
General limitation	7,068.					7,068.



Form 1116

Alternative Minimum Tax Foreign Tax Credit
Pro Rata Share of Allocated Losses

NAME

BRIAN S. & SHERRI JO STAVER

7218

Allocation of Losses from Other Categories

INCOME CLASSIFICATION	INCOME	LOSS	ALLOCATED LOSS	LOSS NOT ALLOCATED
Passive income	2,038.		2,038.	
Income re-sourced by treaty				
General limitation income		7,068.		5,030.
Totals	2,038.	7,068.	2,038.	5,030.

Allocation of U.S. Losses

INCOME CLASSIFICATION	REMAINING INCOME	U.S. LOSS	ALLOCATED LOSS	LOSS NOT ALLOCATED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Recapture of Prior Year Overall Foreign Loss

INCOME CLASSIFICATION	REMAINING INCOME	OVERALL PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				
Recapture percentage				

Recapture of Separate Limitation Loss Accounts

INCOME CLASSIFICATION	REMAINING INCOME	PRIOR YEAR LOSS	RECHARACTERIZED LOSS	LOSS NOT RECHARACTERIZED
Passive income				
Income re-sourced by treaty				
General limitation income		151.		151.
Totals		151.		151.

Recapture of Overall Domestic Loss Prior to 2012

INCOME CLASSIFICATION	U.S. TAXABLE INCOME LIMIT	PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Recapture of Overall Domestic Loss

INCOME CLASSIFICATION	U.S. TAXABLE INCOME LIMIT	PRIOR YEAR LOSS	RECAPTURED LOSS	LOSS NOT RECAPTURED
Passive income				
Income re-sourced by treaty				
General limitation income				
Totals				

Adjustments to Form 1116, Line 15

INC. CLASSIFICATION	OTHER CATEGORIES	U.S. LOSSES	PRIOR YEAR OVERALL	RECAPTURE OF LOSS ACCOUNTS	DOMESTIC RECAPTURE	FORM 1116, LINE 16
Passive	-2,038.					-2,038.
Re-sourced by treaty						
General limitation	7,068.					7,068.



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Depletion

Excess Intangible Drilling Cost Preference

2017

Property Number	Property Description	Preference IDC Expense	Monthly or Cost Depl. Amort. Rate	Amort. of Preference IDC Expense	Excess IDC Expense	Net Income Less Allowable Depletion	Add Back Excess IDC Expense	Net Income for Excess IDC Calculation
1KKR & CO LP					10.	18.	10.	28.
Total					10.	18.	10.	28.

Total excess Intangible Drilling Cost
 Less 65% of Net Income for Excess IDC Calculation
 Excess Intangible Drilling Cost Preference

10.
 18.
 0.



FORM 1040	MISCELLANEOUS INCOME	STATEMENT 1
DESCRIPTION		AMOUNT
CANCELLATION OF DEBT - KKR & CO LP		4.
TOTAL TO FORM 1040, LINE 21		4.

FORM 1040	PENSIONS AND ANNUITIES	STATEMENT 2
FASCORE INSTITUTIONAL SERVICES AMERICAN FUNDS		
AMOUNT RECEIVED THIS YEAR		756.
NONTAXABLE AMOUNT (ROLLOVER)		756.
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		0.
TOTAL INCLUDED IN FORM 1040, LINE 16B		

FORM 1040	WAGES RECEIVED AND TAXES WITHHELD				STATEMENT 3	
T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
S HARRELLS LLC	20,939.	3,375.			1,344.	314.
S CERIDIAN HCM, INC.	7,068.	1,072.			438.	102.
TOTALS	28,007.	4,447.			1,782.	416.



FORM 1040

QUALIFIED DIVIDENDS

STATEMENT 4

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
CISCO SYSTEMS	226.	226.
CHARLES SCHWAB & CO., INC 1630	13,288.	12,914.
CHARLES SCHWAB & CO., INC -4952	1,965.	1,939.
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.	34.	34.
FROM K-1 - KKR & CO LP	234.	110.
TOTAL INCLUDED IN FORM 1040, LINE 9B		15,223.

1

FORM 1040

FEDERAL INCOME TAX WITHHELD

STATEMENT 5

T S DESCRIPTION	AMOUNT
S HARRELLS LLC	3,375.
S CERIDIAN HCM, INC.	1,072.
T KKR & CO LP	2.
TOTAL TO FORM 1040, LINE 64	4,449.

SCHEDULE A MISCELLANEOUS DEDUCTIONS SUBJECT TO FLOOR STATEMENT 6

DESCRIPTION	AMOUNT
CHARLES SCHWAB #1630 - ADVISORY FEE	13,957.
CHARLES SCHWAB #1630 -ADR	15.
CHARLES SCHWAB #4952 - ADVISOR FEE	1,895.
FROM K-1 - KKR & CO LP	24.
TOTAL TO SCHEDULE A, LINE 23	15,891.

SCHEDULE A CASH CONTRIBUTIONS STATEMENT 7

DESCRIPTION	AMOUNT 100% LIMIT	AMOUNT 50% LIMIT	AMOUNT 30% LIMIT
MISCELLANEOUS		200.	
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.		2.	
FROM K-1 - WILLIAMS PARTNERS, LP		2.	
SUBTOTALS		204.	
TOTAL TO SCHEDULE A, LINE 16			204.



SCHEDULE A MORTGAGE INTEREST AND POINTS STATEMENT 8
 REPORTED ON FORM 1098

DESCRIPTION	AMOUNT
HOME MORTGAGE INTEREST PAID TO A FINANCIAL INSTITUTION QUICKEN LOANS INC.	7,306.
TOTAL TO SCHEDULE A, LINE 10	7,306.

SCHEDULE A INVESTMENT INTEREST STATEMENT 9

DESCRIPTION	AMOUNT
CHARLES SCHWAB #4952 - MARGIN INTEREST	61.
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.	26.
FROM K-1 - KKR & CO LP	56.
TOTAL TO SCHEDULE A, LINE 14	143.

SCHEDULE A STATE AND LOCAL GENERAL SALES TAXES STATEMENT 10

DESCRIPTION	AMOUNT
STATE SALES TAX	778.
LOCAL SALES TAX	130.
TOTAL TO SCHEDULE A, LINE 5	908.



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SCHEDULE A

GENERAL SALES TAX DEDUCTION WORKSHEET

STATEMENT 11

1	ENTER YOUR STATE GENERAL SALES TAXES FROM THE APPLICABLE TABLE. FLORIDA IF, FOR ALL OF 2017, YOU LIVED ONLY IN CONNECTICUT, THE DISTRICT OF COLUMBIA, INDIANA, KENTUCKY, MAINE, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW JERSEY, OR RHODE ISLAND, SKIP LINES 2 THROUGH 5, ENTER -0- ON LINE 6, AND GO TO LINE 7. OTHERWISE, GO TO LINE 2.	778.
2	DID YOU LIVE IN ALASKA, ARIZONA, ARKANSAS, COLORADO, GEORGIA, ILLINOIS, LOUISIANA, MISSISSIPPI, MISSOURI, NEW YORK, NORTH CAROLINA, SOUTH CAROLINA, TENNESSEE, UTAH, OR VIRGINIA IN 2017? IF NO, ENTER -0-. IF YES, ENTER YOUR LOCAL GENERAL SALES TAXES FROM THE APPLICABLE TABLE.	0.
3	DID YOUR LOCALITY IMPOSE A LOCAL GENERAL SALES TAX IN 2017? RESIDENTS OF CALIFORNIA AND NEVADA SEE INSTRUCTIONS. IF NO, SKIP LINES 3 THROUGH 5, ENTER -0- ON LINE 6 AND GO TO LINE 7. IF YES, ENTER YOUR LOCAL GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN. WESLEY CHAPEL	1.0000
4	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, SKIP LINES 4 AND 5 AND GO TO LINE 6. IF YES, ENTER YOUR STATE GENERAL SALES TAX RATE, BUT OMIT THE PERCENTAGE SIGN.	6.0000
5	DIVIDE LINE 3 BY LINE 4. ENTER THE RESULT AS A DECIMAL (ROUNDED TO AT LEAST THREE PLACES).	.1670
6	DID YOU ENTER -0- ON LINE 2 ABOVE? IF NO, MULTIPLY LINE 2 BY LINE 3. IF YES, MULTIPLY LINE 1 BY LINE 5.	130.
6A	ADD LINE 1 AND LINE 6.	908.
6B	PART-YEAR DAYS RATE.	1.000000
6C	MULTIPLY LINE 6A BY LINE 6B.	908.
7	ENTER YOUR GENERAL SALES TAXES PAID ON SPECIFIED ITEMS, IF ANY.	
8	DEDUCTION FOR GENERAL SALES TAXES. ADD LINES 6C AND 7. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 5 AND CHECK BOX "B" ON THAT LINE.	908.



SCHEDULE B		AMORTIZABLE BOND PREMIUM ADJUSTMENT	STATEMENT 12
NAME OF PAYER			AMOUNT
CHARLES SCHWAB & CO., INC 1630			4,037.
CHARLES SCHWAB & CO., INC -4952			1,406.
TOTAL ABP ADJUSTMENT TO SCHEDULE B, LINE 1			5,443.

SCHEDULE D		NET SHORT-TERM GAIN OR LOSS FROM FORMS 6252, 4684, 6781 AND 8824	STATEMENT 13
DESCRIPTION OF PROPERTY			GAIN OR LOSS
FORM 6781, PART I			-1.
TOTAL TO SCHEDULE D, PART I, LINE 4			-1.

SCHEDULE D		NET LONG-TERM GAIN OR LOSS FROM FORMS 4797, 2439, 6252, 4684, 6781 AND 8824	STATEMENT 14
DESCRIPTION OF PROPERTY	GAIN OR LOSS	28% GAIN	
FORM 6781, PART I	-1.		
TOTAL TO SCHEDULE D, PART II, LINE 11		-1.	

SCHEDULE D		NET SHORT-TERM GAIN OR LOSS FROM PARTNERSHIPS, S CORPORATIONS, AND FIDUCIARIES	STATEMENT 15
DESCRIPTION OF ACTIVITY			GAIN OR LOSS
ENERGY TRANSFER PARTNERS, L.P.			56.
KKR & CO LP			4.
TOTAL TO SCHEDULE D, PART I, LINE 5			60.



SCHEDULE D NET LONG-TERM GAIN OR LOSS FROM STATEMENT 16
PARTNERSHIPS, S CORPORATIONS, AND FIDUCIARIES

DESCRIPTION OF ACTIVITY	GAIN OR LOSS	28% GAIN
ENERGY TRANSFER PARTNERS, L.P.	312.	
KKR & CO LP	486.	
TOTAL TO SCHEDULE D, PART II, LINE 12	798.	

SCHEDULE D CAPITAL GAIN DISTRIBUTIONS STATEMENT 17

NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
CHARLES SCHWAB & CO., INC 1630	625.	
TOTALS TO SCHEDULE D, LINE 13	625.	

SCHEDULE D CAPITAL LOSS CARRYOVER STATEMENT 18

- | | |
|--|---------|
| 1. ENTER THE AMOUNT FROM FORM 1040, LINE 41 | 28,843. |
| 2. ENTER THE LOSS FROM SCHEDULE D, LINE 21, AS A POSITIVE AMOUNT | 3,000. |
| 3. COMBINE LINES 1 AND 2. IF ZERO OR LESS, ENTER -0- | 31,843. |
| 4. ENTER THE SMALLER OF LINE 2 OR LINE 3 | 3,000. |
| 5. ENTER THE LOSS FROM SCHEDULE D, LINE 7, AS A POSITIVE AMOUNT | 5,954. |
| 6. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 15 | 632. |
| 7. ADD LINES 4 AND 6 | 3,632. |
| 8. SHORT-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR.
SUBTRACT LINE 7 FROM LINE 5. IF ZERO OR LESS, ENTER -0- | 2,322. |
| 9. ENTER THE LOSS FROM SCHEDULE D, LINE 15, AS A POSITIVE AMOUNT | |
| 10. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 7 | |
| 11. SUBTRACT LINE 5 FROM LINE 4. IF ZERO OR LESS, ENTER -0- | |
| 12. ADD LINES 10 AND 11 | |
| 13. LONG-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR.
SUBTRACT LINE 12 FROM LINE 9. IF ZERO OR LESS, ENTER -0- | |

11

SCHEDULE E OTHER EXPENSES STATEMENT 19

KKR & CO LP - ROYALTY

DESCRIPTION	AMOUNT
ROYALTY INCOME DEDUCTION - KKR & CO LP	2.
TOTAL TO SCHEDULE E, PAGE 1, LINE 19	2.

SCHEDULE E INCOME OR (LOSS) FROM PARTNERSHIPS AND S CORPS STATEMENT 20

NAME

EMPLOYER ID NO.	ANY NOT AT RISK	X IF FRN CODE	PASSIVE LOSS	PASSIVE INCOME	NONPASSIVE LOSS	SEC. 179 DEDUCTION	NONPASSIVE INCOME
ENERGY TRANSFER PARTNERS, L.P.							
73-1493906		P	0.				
ENTERPRISE PRODUCTS PARTNERS, L.P.							
76-0568219		P	0.				
WILLIAMS PARTNERS, LP							
20-2485124		P *					37.
PRIOR YEAR PAL							
20-2485124		P *			7,105.		
ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)							
76-0568219		P	0.				
WILLIAMS PARTNERS, LP							
20-2485124		P	0.				
KKR & CO LP							
26-0426107		P *			6.		2.
TOTALS TO SCH. E, LN. 29			0.		7,111.		39.

* ENTIRE DISPOSITION OF PASSIVE ACTIVITY

FORM 1116 EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME STATEMENT 21

DESCRIPTION	COUNTRY	AMOUNT
WILLIAMS PARTNERS, LP	CANADA	7,068.
TOTAL TO FORM 1116, PART I, LINE 2		7,068.



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FORM 1116 SUMMARY OF FOREIGN TAXES PAID OR ACCRUED STATEMENT 22

PASSIVE INCOME

NAME OF COUNTRY IMPOSING TAX

DATE PAID	DATE ACCRUED	AMT/FOREIGN CURRENCY	AMOUNT IN U.S. DOLLARS			
			DIVIDENDS	RENT/ROYALTY	INTEREST	OTHER
		OTHER COUNTRIES	0.			2.
	12/31/17	OTHER COUNTRIES	0.	347.		
				347.		2.
TOTAL TO FORM 1116, PART II, LINE 8						349.

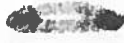
PRIOR YEAR TAXES PAID IN THE CURRENT YEAR:

	FOREIGN AMT	CONV. RATE	U.S. AMT
2016			
2015			
2014			
2013			
2012			

TOTAL PRIOR YEAR TAXES PAID IN THE CURRENT YEAR

FORM 1116 EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME STATEMENT 23

DESCRIPTION	COUNTRY	AMOUNT
WILLIAMS PARTNERS, LP	CANADA	0.
WILLIAMS PARTNERS, LP	CANADA	0.
KKR & CO LP	OTHER COUNTRIES	26.
KKR & CO LP	OTHER COUNTRIES	2.
TOTAL TO FORM 1116, PART I, LINE 2		28.



FORM 1116 FOREIGN TAX CREDIT CARRYOVER / CARRYBACK STATEMENT 24

PASSIVE INCOME

YEAR OF CREDIT	TOTAL FOREIGN TAXES PAID	FOREIGN TAX CR CLAIMED	BALANCE AVAILABLE
2016 FOREIGN TAX CREDIT	285.	126.	141.
2015 FOREIGN TAX CREDIT	0.	0.	0.
2014 FOREIGN TAX CREDIT	0.	0.	0.
2013 FOREIGN TAX CREDIT	0.	0.	0.
2012 FOREIGN TAX CREDIT	0.	0.	0.
2011 FOREIGN TAX CREDIT	0.	0.	0.
2010 FOREIGN TAX CREDIT	0.	0.	0.
2009 FOREIGN TAX CREDIT	0.	0.	0.
2008 FOREIGN TAX CREDIT	0.	0.	0.
2007 FOREIGN TAX CREDIT	0.	0.	0.
FOREIGN TAX CR CARRYBACK TO 2017			0.
TOTAL TO FORM 1116, PART III, LINE 10			141.

FORM 4797 PROPERTY HELD MORE THAN ONE YEAR STATEMENT 25

DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	DEPR.	COST OR BASIS	GAIN OR LOSS
ENERGY TRANSFER PARTNERS, L.P.						0.
ENTERPRISE PRODUCTS PARTNERS, L.P.						0.
WILLIAMS PARTNERS, LP						-116.
ENTERPRISE PRODUCTS PARTNERS, L.P. (INDIVIDUAL)						0.
WILLIAMS PARTNERS, LP						0.
KKR & CO LP						-98.
TOTAL TO 4797, PART I, LINE 2						-214.



FORM 4797 NONRECAPTURED NET SECTION 1231 LOSSES STATEMENT 26
FROM PRIOR YEARS

TAX YEAR	SECTION 1231 LOSSES	SECTION 1231 LOSSES RECAPTURED	NONRECAPTURED SECTION 1231 LOSSES
2012	385.	51.	334.
2013	91.		91.
2014	282.		282.
2015			
2016			
TOTAL TO FORM 4797, LINE 8	758.	51.	707.

FORM 6251 PASSIVE ACTIVITIES STATEMENT 27

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
RESIDENTIAL PROPERTY - SCH E 9261 N CONGRESS ST, NEW MARKET, VA 22844-9506		-2,624.	-2,624.	
WILLIAMS PARTNERS, LP - SCH E PTP		-6,659.	-7,068.	409.
KKR & CO LP - PTP	SCH E	-30.	-6.	-24.
TOTAL TO FORM 6251, LINE 19				385.



FORM 1116 ALTERNATIVE MINIMUM TAX FOREIGN TAX CREDIT CARRYOVER/CARRYBACK STATEMENT 28

PASSIVE INCOME

YEAR OF CREDIT	TOTAL FOREIGN TAXES PAID	FOREIGN TAX CR CLAIMED	BALANCE AVAILABLE
2016 ALT. MIN. TAX CREDIT	285.	0.	265.
2015 ALT. MIN. TAX CREDIT	0.	0.	0.
2014 ALT. MIN. TAX CREDIT	0.	0.	0.
2013 ALT. MIN. TAX CREDIT	0.	0.	0.
2012 ALT. MIN. TAX CREDIT	0.	0.	0.
2011 ALT. MIN. TAX CREDIT	0.	0.	0.
2010 ALT. MIN. TAX CREDIT	0.	0.	0.
2009 ALT. MIN. TAX CREDIT	0.	0.	0.
2008 ALT. MIN. TAX CREDIT	0.	0.	0.
2007 ALT. MIN. TAX CREDIT	0.	0.	0.
FOREIGN TAX CR CARRYBACK TO 2017			0.
TOTAL TO FORM 1116 (AMT), PART III, LINE 10			265.

FORM 4952 INVESTMENT INTEREST EXPENSE STATEMENT 29

DESCRIPTION	CURRENT	CARRYOVER
CHARLES SCHWAB #4952 - MARGIN INTEREST	61.	
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.	26.	
FROM K-1 - KKR & CO LP	56.	
TOTALS TO FORM 4952, LINES 1 AND 2	143.	

FORM 4952 INCOME FROM PROPERTY HELD FOR INVESTMENT STATEMENT 30

DESCRIPTION	AMOUNT
INTEREST INCOME	29,214.
DIVIDEND INCOME	15,747.
KKR & CO LP - ROYALTY	16.
ENERGY TRANSFER PARTNERS, L.P.	-6.
KKR & CO LP	2.
TOTAL TO FORM 4952, LINE 4A	44,973.



FORM 4952	INVESTMENT EXPENSES	STATEMENT 31
DESCRIPTION		AMOUNT
KKR & CO LP - ROYALTY		2.
SCHEDULE A DEDUCTIONS		14,663.
TOTAL TO FORM 4952, LINE 5		14,665.

FORM 4952	INVESTMENT INTEREST EXPENSE DEDUCTION SUMMARY	STATEMENT 32			
NAME	FORM OR SCHEDULE	INVESTMENT INTEREST EXPENSE	INVESTMENT INTEREST EXPENSE C/O	DISALLOWED INVESTMENT INTEREST EXPENSE	ALLOWED INVESTMENT INTEREST EXPENSE
CHARLES SCHWAB #4952 -	SCH A	61.	0.	0.	61.
FROM K-1 - ENERGY TRAN	SCH A	26.	0.	0.	26.
FROM K-1 - KKR & CO LP	SCH A	56.	0.	0.	56.
TOTALS		143.	0.	0.	143.

FORM 4952AMT	INVESTMENT INTEREST EXPENSE	STATEMENT 33
DESCRIPTION		CURRENT CARRYOVER
CHARLES SCHWAB #4952 - MARGIN INTEREST		61.
FROM K-1 - ENERGY TRANSFER PARTNERS, L.P.		26.
FROM K-1 - KKR & CO LP		56.
TOTALS TO FORM 4952AMT, LINES 1 AND 2		143.



FORM 8880 CREDIT LIMIT WORKSHEET STATEMENT 34

- 1 ENTER THE AMOUNT FROM FORM 1040, LINE 47; FORM 1040A, LINE 30; FORM 1040NR, LINE 45. 553.
- 2 FORM 1040 FILERS: ENTER THE TOTAL OF YOUR CREDITS FROM LINES 48 THROUGH 50 AND SCHEDULE R, LINE 22.
 FORM 1040A FILERS: ENTER THE TOTAL OF YOUR CREDITS FROM LINES 31 THROUGH 33.
 FORM 1040NR FILERS: ENTER THE TOTAL OF YOUR CREDITS FROM LINE 46 AND 47. 0.
- 3 SUBTRACT LINE 2 FROM LINE 1. ALSO ENTER THIS AMOUNT ON FORM 8880, LINE 11. BUT IF ZERO OR LESS, STOP; YOU CANNOT TAKE THE CREDIT - DO NOT FILE THIS FORM. 553.

FORM 8582 ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1 STATEMENT 35

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW MARKET, VA 22844-	0.	-2,624.			-2,624.
TOTALS	0.	-2,624.			-2,624.

FORM 8582 LOSSES FROM ACTIVE RENTAL OF REAL ESTATE-WORKSHEET 4 STATEMENT 36

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	SPECIAL ALLOWANCE	REMAINING UNALLOWED LOSS
RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW MARKET, VA 22844-	SCH E	2,624.	1.000000000	2,624.	0.
TOTALS		2,624.	1.000000000	2,624.	0.



FORM 8582 ALLOWED LOSSES - WORKSHEET 6 STATEMENT 37

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW MARKET, VA 22844-	SCH E	2,624.	0.	2,624.
TOTALS		2,624.	0.	2,624.

FORM 8582 SUMMARY OF PASSIVE ACTIVITIES STATEMENT 38

RE R E A - NAME	FORM OR SCHEDULE	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
X RESIDENTIAL PROPERTY - 9261 N CONGRESS ST, NEW MARKET, VA 22844-	SCH E		-2,624.		2,624.
TOTALS			-2,624.		2,624.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME					
TOTAL TO FORM 8582, LINE 16					2,624.

[REDACTED]

FORM 8582

MODIFIED AGI

STATEMENT 39

INCOME

WAGES, SALARIES, TIPS ETC.		28,007.
DIVIDEND INCOME		15,747.
TAXABLE REFUNDS		
ALIMONY RECEIVED		
TAXABLE IRA DISTRIBUTIONS		
TAXABLE PENSIONS AND ANNUITIES		
UNEMPLOYMENT COMPENSATION		
OTHER INCOME		4.
INTEREST INCOME	29,214.	
ADD: SERIES EE AND I EXCLUSION		
		29,214.
BUSINESS INCOME OR LOSS		
ADD: PASSIVE LOSSES		
SUBTRACT: PASSIVE INCOME		
SALE OF ASSETS (BEFORE CAPITAL LOSS LIMITATION)	-4,198.	
ADD: PASSIVE/RREA PROFESSIONAL LOSSES		
SUBTRACT: PASSIVE INCOME		
RENTAL, ROYALTY OR PASSTHROUGH INCOME OR LOSS	LIMITED -9,682.	-1,876.
ADD: PASSIVE/RREA PROFESSIONAL LOSSES	2,624.	
SUBTRACT: PASSIVE INCOME		
FARM OR FARM RENTAL INCOME OR LOSS		-7,058.
ADD: PASSIVE/RREA PROFESSIONAL LOSSES		
SUBTRACT: PASSIVE INCOME		
TOTAL INCOME		64,038.
<u>ADJUSTMENTS</u>		
MOVING EXPENSES		
SELF-EMPLOYED HEALTH INSURANCE DEDUCTION		
PENALTY ON EARLY WITHDRAWAL OF SAVINGS		
ALIMONY PAID		
KEOGH/SEP DEDUCTION		
OTHER ADJUSTMENTS		
TOTAL ADJUSTMENTS		
TOTAL TO FORM 8582, LINE 7		64,038.



PTP CREDIT WKSHT ALLOWED CREDITS FROM PTPS STATEMENT 40

NAME OF ACTIVITY	FORM REPORTED ON	TOTAL CREDITS	ALLOWED BY TAX ATTRIBUTABLE	SPECIAL ALLOWANCE	UNALLOWED CREDITS
KKR & CO LP	FORM 3800, LINE 3	6.	0.		6.
TOTALS		6.	0.		6.

PTP CREDIT WKSHT TAX ATTRIBUTABLE TO PTPS STATEMENT 41

NAME OF ACTIVITY	PASSIVE INCOME/LOSS	TAX ATTRIBUTABLE
KKR & CO LP - ACTIVITY NO. 22	-104.	0.

PTP CREDIT WKSHT OTHER PASSIVE ACTIVITY CREDITS STATEMENT 42

NAME OF ACTIVITY	FROM FORM	CURRENT YEAR CREDIT	PRIOR YEAR UNALLOWED CREDITS	TOTAL CREDITS
KKR & CO LP	8830/3800, LINE 2	6.		6.
TOTALS TO PART III		6.		6.

FORM 8903 ALLOCABLE COST OF GOODS SOLD STATEMENT 43

NAME OF ACTIVITY	OIL-RELATED ACTIVITIES	ALL ACTIVITIES
KKR & CO LP		88.
TOTAL TO FORM 8903, LINE 2		88.



FORM 8903 DEDUCTIONS AND LOSSES ALLOCABLE TO DPGR STATEMENT 44

NAME OF ACTIVITY	OIL-RELATED ACTIVITIES	ALL ACTIVITIES
KKR & CO LP	188.	188.
TOTAL TO FORM 8903, LINE 3	188.	188.

FORM 1116 U.S. AND FOREIGN SOURCE INCOME SUMMARY FOREIGN DIVIDEND INCOME STATEMENT 45

DESCRIPTION	AMOUNT
CHARLES SCHWAB & CO., INC 1630	1,786.
TOTAL FOREIGN DIVIDEND INCOME	1,786.

FORM 1116 U.S. AND FOREIGN SOURCE INCOME SUMMARY FOREIGN PARTNERSHIP/S-CORPORATION INCOME STATEMENT 46

DESCRIPTION	AMOUNT
KKR & CO LP	264.
TOTAL FOREIGN PARTNERSHIP/S-CORPORATION INCOME	264.

FORM 1116 U.S. AND FOREIGN SOURCE INCOME SUMMARY TOTAL PARTNERSHIP/S-CORPORATION INCOME/LOSS STATEMENT 47

DESCRIPTION	INCOME	LOSS
WILLIAMS PARTNERS, LP		-7,068.
KKR & CO LP	558.	
TOTAL PARTNERSHIP/S-CORPORATION INCOME/LOSS	558.	-7,068.

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