

To be used by Individuals making an Election to Pay Net 965 Tax Liability in Installments Under section 965(h), and S Corporation Shareholder Election and Report of Deferred Net 965 Tax Liability Under section 965(i)

PART I Report of Net 965 Tax Liability and Election to Pay in Installments

| | (a) Year of Income Inclusion, Liability Assumption, or Liability Triggering Event (see instructions) | | (b) Taxpayer's Net Tax Liability with all 965 related amounts (see instructions) | (c) Taxpayer's Net Tax Liability without 965 related amounts (see instructions) | (d) Net 965 Tax Liability (column (b) less column (c)) | (e) S Corporation Shareholder Deferred Net 965 Tax Liability (From Part III, column (g), line total; see instructions) | (f) Net 965 Tax Liability eligible for installment payment election (see instructions) |
|---|--|----|--|---|---|---|--|
| 1 | 2017 | | | | | | |
| 2 | 2018 | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |
| | (g) Installment Election Made | | (h) Net 965 Tax Liability to be paid in full Year 1 (if column (g) "No" enter amount from column (f)) | (i) Net 965 Tax Liability to be paid in installments (if column (g) "Yes" enter amount in column (f) and see instructions) | | (j) Net 965 Tax Liability Transferred (Out), Transferred In, or Subsequent Adjustments, if any (see instructions) | (k) Tax Identification Number of buyer/transferee or the seller/transferor |
| | Yes | No | | | | | |
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |

PART II Record of Amount of Net 965 Tax Liability Paid by the Taxpayer (Caution: see instructions)

| | (a) Year of Income Inclusion, Liability Assumption, or Liability Triggering Event (see instructions) | (b) Paid in Year 1 | (c) Paid in Year 2 | (d) Paid in Year 3 | (e) Paid in Year 4 | (f) Paid in Year 5 |
|--------------------|--|-----------------------|-----------------------|---|---|-----------------------|
| 1 | 2017 | | | | | |
| 2 | 2018 | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| | (g) Paid in Year 6 | (h) Paid in Year 7 | (i) Paid in Year 8 | (j) Net 965 Tax Liability Remaining Unpaid (see instructions) | (k) Net 965 Tax Liability Paid in This Reporting Year | |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| Totals ▶ | | | | | | |