

Form **990-T**

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

OMB No. 1545-0047

For calendar year 2020 or other tax year beginning JUL 1, 2020, and ending JUN 30, 2021

2020

Department of the Treasury
Internal Revenue Service

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

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

| | | | |
|---|------------------------------|--|---|
| <p>A <input type="checkbox"/> Check box if address changed.</p> <p>B Exempt under section <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 408(e) <input type="checkbox"/> 220(e) <input type="checkbox"/> 408A <input type="checkbox"/> 530(a) <input type="checkbox"/> 529(a) <input type="checkbox"/> 529S</p> | <p>Print or Type</p> | <p>Name of organization (<input type="checkbox"/> Check box if name changed and see instructions.) THE J. PAUL GETTY TRUST</p> <p>Number, street, and room or suite no. If a P.O. box, see instructions. 1200 GETTY CENTER DRIVE #401</p> <p>City or town, state or province, country, and ZIP or foreign postal code LOS ANGELES, CA 90049</p> | <p>D Employer identification number 95-1790021</p> <p>E Group exemption number (see instructions)</p> <p>F <input type="checkbox"/> Check box if an amended return.</p> |
| <p>C Book value of all assets at end of year ▶ 13,099,579,161.</p> | | | |

G Check organization type ▶ 501(c) corporation 501(c) trust 401(a) trust Other trust Applicable reinsurance entity

H Check if filing only to ▶ Claim credit from Form 8941 Claim a refund shown on Form 2439

I Check if a 501(c)(3) organization filing a consolidated return with a 501(c)(2) titleholding corporation ▶

J Enter the number of attached Schedules A (Form 990-T) ▶ **6**

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

L The books are in care of ▶ **WILLIAM G. HUMPHRIES** Telephone number ▶ **310-440-6040**

Part I Total Unrelated Business Taxable Income

| | | |
|--|----|----------|
| 1 Total of unrelated business taxable income computed from all unrelated trades or businesses (see instructions) | 1 | 745,339. |
| 2 Reserved | 2 | |
| 3 Add lines 1 and 2 | 3 | 745,339. |
| 4 Charitable contributions (see instructions for limitation rules) STMT 12 STMT 13 | 4 | 0. |
| 5 Total unrelated business taxable income before net operating losses. Subtract line 4 from line 3 | 5 | 745,339. |
| 6 Deduction for net operating loss. See instructions STATEMENT 14 | 6 | 745,339. |
| 7 Total of unrelated business taxable income before specific deduction and section 199A deduction. Subtract line 6 from line 5 | 7 | |
| 8 Specific deduction (generally \$1,000, but see instructions for exceptions) | 8 | 1,000. |
| 9 Trusts. Section 199A deduction. See instructions | 9 | |
| 10 Total deductions. Add lines 8 and 9 | 10 | 1,000. |
| 11 Unrelated business taxable income. Subtract line 10 from line 7. If line 10 is greater than line 7, enter zero | 11 | 0. |

Part II Tax Computation

| | | |
|--|---|---------|
| 1 Organizations taxable as corporations. Multiply Part I, line 11 by 21% (0.21) | 1 | 0. |
| 2 Trusts taxable at trust rates. See instructions for tax computation. Income tax on the amount on Part I, line 11 from: <input checked="" type="checkbox"/> Tax rate schedule or <input type="checkbox"/> Schedule D (Form 1041) | 2 | 0. |
| 3 Proxy tax. See instructions | 3 | |
| 4 Other tax amounts. See instructions | 4 | |
| 5 Alternative minimum tax (trusts only) | 5 | 11,155. |
| 6 Tax on noncompliant facility income. See instructions | 6 | |
| 7 Total. Add lines 3 through 6 to line 1 or 2, whichever applies | 7 | 11,155. |

LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-T** (2020)

| Part III Tax and Payments | | | |
|---------------------------|---|----|---------|
| 1a | Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116) | 1a | 0. |
| b | Other credits (see instructions) | 1b | |
| c | General business credit. Attach Form 3800 (see instructions) | 1c | 11,155. |
| d | Credit for prior year minimum tax (attach Form 8801 or 8827) | 1d | |
| e | Total credits. Add lines 1a through 1d | 1e | 11,155. |
| 2 | Subtract line 1e from Part II, line 7 | 2 | 0. |
| 3 | Other taxes. Check if from: <input type="checkbox"/> Form 4255 <input type="checkbox"/> Form 8611 <input type="checkbox"/> Form 8697 <input type="checkbox"/> Form 8866 Other (attach statement) | 3 | |
| 4 | Total tax. Add lines 2 and 3 (see instructions). <input type="checkbox"/> Check if includes tax previously deferred under section 1294. Enter tax amount here | 4 | 0. |
| 5 | 2020 net 965 tax liability paid from Form 965-A or Form 965-B, Part II, column (k), line 4 | 5 | 0. |
| 6a | Payments: A 2019 overpayment credited to 2020 | 6a | |
| b | 2020 estimated tax payments. Check if section 643(g) election applies <input type="checkbox"/> | 6b | |
| c | Tax deposited with Form 8868 | 6c | |
| d | Foreign organizations: Tax paid or withheld at source (see instructions) | 6d | |
| e | Backup withholding (see instructions) | 6e | |
| f | Credit for small employer health insurance premiums (attach Form 8941) | 6f | |
| g | Other credits, adjustments, and payments: Form 2439 _____ Form 4136 _____ Other _____ Total | 6g | |
| 7 | Total payments. Add lines 6a through 6g | 7 | |
| 8 | Estimated tax penalty (see instructions). Check if Form 2220 is attached | 8 | |
| 9 | Tax due. If line 7 is smaller than the total of lines 4, 5, and 8, enter amount owed | 9 | |
| 10 | Overpayment. If line 7 is larger than the total of lines 4, 5, and 8, enter amount overpaid | 10 | |
| 11 | Enter the amount of line 10 you want: Credited to 2021 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/> | 11 | |

| Part IV Statements Regarding Certain Activities and Other Information (see instructions) | | Yes | No |
|--|--|-----|----|
| 1 | At any time during the 2020 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If "Yes," the organization may have to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If "Yes," enter the name of the foreign country here SEE STATEMENT 15 | X | |
| 2 | During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," see instructions for other forms the organization may have to file. | | X |
| 3 | Enter the amount of tax-exempt interest received or accrued during the tax year \$ _____ | | |
| 4a | Did the organization change its method of accounting? (see instructions) | | X |
| b | If 4a is "Yes," has the organization described the change on Form 990, 990-EZ, 990-PF, or Form 1128? If "No," explain in Part V | | |

Part V Supplemental Information

Provide the explanation required by Part IV, line 4b. Also, provide any other additional information. See instructions.

| | | | | |
|---|--|----------------------|-------------------------------|---|
| Sign Here | Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge. | | | |
| | DocuSigned by: Steven A. Olsen 05/11/22 VP, CFO & COO | | | |
| Paid Preparer Use Only | Signature of | Date | Check if self-employed | May the IRS discuss this return with the preparer shown below (see instructions)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| | 1F39AE0BE1CF48A... | 05/11/22 | <input type="checkbox"/> | |
| | Print/Type preparer's name | Preparer's signature | PTIN | |
| | CAREY MCKEE | <i>Carey McKee</i> | 05/11/22 | P01281067 |
| Firm's name KPMG LLP | | | Firm's EIN 13-5565207 | |
| Firm's address 550 SOUTH HOPE STREET, SUITE 1500 LOS ANGELES, CA 90071 | | | Phone no. 213-972-4000 | |

THE J. PAUL GETTY TRUST

95-1790021

| FORM 990-T | CONTRIBUTIONS | STATEMENT 12 |
|--|------------------------------|--------------|
| DESCRIPTION/KIND OF PROPERTY | METHOD USED TO DETERMINE FMV | AMOUNT |
| AMERICAN ASSOCIATION OF MUSEUMS | N/A | 100,000. |
| AMERICAN COUNCIL OF LEARNED SOCIETIES | N/A | 350,000. |
| ARMAND HAMMER MUSEUM OF ART AND CULTURAL CENTER, INC. | N/A | 215,000. |
| ART CENTER COLLEGE OF DESIGN CALIFORNIA COMMUNITY FOUNDATION | N/A | 110,000. |
| CALIFORNIA INSTITUTE OF THE ARTS | N/A | 6,410,000. |
| CLAREMONT GRADUATE UNIVERSITY | N/A | 160,000. |
| COLLEGE ART ASSOCIATION OF AMERICA, INC | N/A | 125,000. |
| COMMUNITY PARTNERS FOR CAL AFR AMER MUS (CAAM) | N/A | 371,000. |
| FULCRUM ARTS | N/A | 120,000. |
| INTERNATIONAL PRINT CENTER NEW YORK | N/A | 100,000. |
| LA JOLLA HISTORICAL SOCIETY | N/A | 100,000. |
| LOS ANGELES REGIONAL FOOD BANK | N/A | 175,000. |
| MINGEI INTERNATIONAL, INC. | N/A | 100,000. |
| MISTAKE ROOM INC. | N/A | 110,000. |
| MUSEUM ASSOCIATES/LACMA | N/A | 282,000. |
| MUSEUM OF CONTEMPORARY ART | N/A | 113,000. |
| MUSEUM OF FINE ARTS | N/A | 100,000. |
| NATIONAL ACADEMY OF SCIENCES | N/A | 100,000. |
| NEW YORK UNIVERSITY | N/A | 890,000. |
| ORANGE COUNTY MUSEUM OF ART | N/A | 100,000. |
| POMONA COLLEGE | N/A | 120,000. |
| PRESIDENT AND FELLOWS OF HARVARD COLLEGE | N/A | 242,000. |
| REGENTS OF THE UNIVERSITY OF CALIFORNIA | N/A | 400,000. |
| RESEARCH FOUNDATION FOR THE STATE UNIVERSITY OF NEW YORK | N/A | 245,000. |
| THE CHRYSLER MUSEUM, INC | N/A | 100,000. |
| THE WENDE MUSEUM OF THE COLD WAR, INC | N/A | 100,000. |
| TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA | N/A | 570,000. |
| UNIVERSITY OF SOUTHERN CALIFORNIA | N/A | 198,000. |
| CHARITABLE CONTRIBUTIONS - E9 | N/A | 8. |
| CHARITABLE CONTRIBUTIONS - A19 | N/A | 6,120. |
| CHARITABLE CONTRIBUTIONS - A35 | N/A | 67. |
| CHARITABLE CONTRIBUTIONS - A36 | N/A | 447. |
| CHARITABLE CONTRIBUTIONS - E28 | N/A | 58. |
| CHARITABLE CONTRIBUTIONS - A41 | N/A | 1,244. |
| CHARITABLE CONTRIBUTIONS - A48 | N/A | 285. |
| CHARITABLE CONTRIBUTIONS - A50 | N/A | 123. |
| CHARITABLE CONTRIBUTIONS - A55 | N/A | 1. |
| CHARITABLE CONTRIBUTIONS - A56 | N/A | 2. |

| <u>THE J. PAUL GETTY TRUST</u> | | | | <u>95-1790021</u> |
|--------------------------------|---|-----|-----|-------------------|
| CHARITABLE CONTRIBUTIONS | - | A59 | N/A | 124. |
| CHARITABLE CONTRIBUTIONS | - | A60 | N/A | 391. |
| CHARITABLE CONTRIBUTIONS | - | A61 | N/A | 55. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E78A | | | | 43. |
| CHARITABLE CONTRIBUTIONS | - | E85 | N/A | 410. |
| CHARITABLE CONTRIBUTIONS | - | E94 | N/A | 94. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E107 | | | | 175. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E108 | | | | 6. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E110 | | | | 3. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E109 | | | | 153. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E146 | | | | 1,087. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E147 | | | | 293. |
| CHARITABLE CONTRIBUTIONS | - | A95 | N/A | 557. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E161 | | | | 251. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E162 | | | | 67. |
| CHARITABLE CONTRIBUTIONS | - | C49 | N/A | 7. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E175A | | | | 143. |
| CHARITABLE CONTRIBUTIONS | - | E51 | N/A | 6. |
| CHARITABLE CONTRIBUTIONS | - | E53 | N/A | 32. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A111 | | | | 162. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A114A | | | | 214. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A114C | | | | 4. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A114D | | | | 12,489. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A115C | | | | 1. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A115E | | | | 219. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A121 | | | | 539. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| E184 | | | | 9. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120B | | | | 234. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120C | | | | 11. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120D | | | | 43. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120E | | | | 11. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120G | | | | 28. |
| CHARITABLE CONTRIBUTIONS | - | | N/A | |
| A120H | | | | 85. |

THE J. PAUL GETTY TRUST

95-1790021

TOTAL TO FORM 990-T, PART I, LINE 4

12,232,301.

FORM 990-T

CONTRIBUTIONS SUMMARY

STATEMENT 13

CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS - 60% LIMIT

FOR TAX YEAR 2019

TOTAL CARRYOVER

TOTAL CURRENT YEAR 60% CONTRIBUTIONS

TOTAL CONTRIBUTIONS AVAILABLE

TAXABLE INCOME LIMITATION AS ADJUSTED 0

EXCESS 60% CONTRIBUTIONS 0

TOTAL EXCESS CONTRIBUTIONS 0

ALLOWABLE CONTRIBUTIONS DEDUCTION 0

TAXABLE INCOME FOR LIMITATION AFTER 60% CONTRIBUTIONS 0

CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS - 50% LIMIT

FOR TAX YEAR 2015 6,897,853

FOR TAX YEAR 2016 4,437,524

FOR TAX YEAR 2017 3,582,799

FOR TAX YEAR 2018 3,409,801

FOR TAX YEAR 2019 4,220,840

TOTAL CARRYOVER 22,548,817

TOTAL CURRENT YEAR 50% CONTRIBUTIONS 12,232,301

TOTAL CONTRIBUTIONS AVAILABLE 34,781,118

TAXABLE INCOME LIMITATION AS ADJUSTED 0

EXCESS 50% CONTRIBUTIONS 34,781,118

TOTAL EXCESS CONTRIBUTIONS 34,781,118

ALLOWABLE CONTRIBUTIONS DEDUCTION 0

TAXABLE INCOME FOR LIMITATION AFTER 50% CONTRIBUTION 0

QUALIFIED CASH CONTRIBUTIONS - 100% LIMIT

TOTAL CURRENT YEAR 100% CONTRIBUTIONS

TAXABLE INCOME LIMITATION AS ADJUSTED 0

EXCESS 100% CONTRIBUTIONS 0

ALLOWABLE CONTRIBUTION DEDUCTION 0

TOTAL CONTRIBUTION DEDUCTION 0

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T

PRE 2018 NOL SCHEDULE

STATEMENT 14

| | |
|---|-------------|
| PRE-2018 NOL CARRY FORWARD FROM PRIOR YEAR | 49,294,861. |
| PRE-2018 NOL DEDUCTION INCLUDED IN PART I, LINE 6 | 745,339. |

| | |
|------------------------------------|------------------|
| SCHEDULE A PORTION OF PRE-2018 NOL | |
| SCHEDULE A ENTITY | SCHEDULE A SHARE |

| | |
|---|----|
| 1 | 0. |
| 2 | 0. |
| 3 | 0. |
| 4 | 0. |
| 5 | 0. |
| 6 | 0. |

| | |
|--|-------------|
| TOTAL SCHEDULE A SHARE OF PRE-2018 NOL | 0. |
| NET OPERATING DEDUCTION | 745,339. |
| BALANCE AFTER PRE-2018 NOL DEDUCTION | 0. |
| EXPIRING NET OPERATING LOSSES | 0. |
| CARRY FORWARD OF NET OPERATING LOSS | 48,549,522. |

FORM 990-T

NAME OF FOREIGN COUNTRY IN WHICH
ORGANIZATION HAS FINANCIAL INTEREST

STATEMENT 15

NAME OF COUNTRY

CANADA
JAPAN
KOREA (SOUTH)
LUXEMBOURG
UNITED KINGDOM
SWITZERLAND

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY 1

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 901101 | D Sequence: 1 of 6 |

E Describe the unrelated trade or business ▶ QUALIFYING PARTNERSHIP INVESTMENTS

| Part I Unrelated Trade or Business Income | (A) Income | (B) Expenses | (C) Net |
|---|----------------------|--------------|------------|
| 1 a Gross receipts or sales | | | |
| b Less returns and allowances | | | |
| c Balance ▶ | 1c | | |
| 2 Cost of goods sold (Part III, line 8) | 2 | | |
| 3 Gross profit. Subtract line 2 from line 1c | 3 | | |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | 4a 9,012,656. | | 9,012,656. |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | 4b 1,102,518. | | 1,102,518. |
| c Capital loss deduction for trusts | 4c | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 16 STATEMENT 17 | 5 -12647266. | | -12647266. |
| 6 Rent income (Part IV) | 6 | | |
| 7 Unrelated debt-financed income (Part V) | 7 | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 8 | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 9 | | |
| 10 Exploited exempt activity income (Part VIII) | 10 | | |
| 11 Advertising income (Part IX) | 11 | | |
| 12 Other income (see instructions; attach statement) STMT 18 | 12 2,267,655. | | 2,267,655. |
| 13 Total. Combine lines 3 through 12 | 13 -264,437. | | -264,437. |

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

| | | |
|--|-----------|-------------|
| 1 Compensation of officers, directors, and trustees (Part X) | 1 | 407,892. |
| 2 Salaries and wages | 2 | 976,513. |
| 3 Repairs and maintenance | 3 | |
| 4 Bad debts | 4 | |
| 5 Interest (attach statement) (see instructions) | 5 | |
| 6 Taxes and licenses | 6 | 9,851. |
| 7 Depreciation (attach Form 4562) (see instructions) | 7 | |
| 8 Less depreciation claimed in Part III and elsewhere on return | 8a | |
| 9 Depletion | 9 | 9,242,617. |
| 10 Contributions to deferred compensation plans | 10 | |
| 11 Employee benefit programs | 11 | 415,920. |
| 12 Excess exempt expenses (Part VIII) | 12 | |
| 13 Excess readership costs (Part IX) | 13 | |
| 14 Other deductions (attach statement) | 14 | |
| 15 Total deductions. Add lines 1 through 14 | 15 | 11,052,793. |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | 16 | -11317230. |
| 17 Deduction for net operating loss (see instructions) | 17 | 0. |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | 18 | -11317230. |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

Part III Cost of Goods Sold

Enter method of inventory valuation

Table with 8 rows for Cost of Goods Sold. Rows include: 1 Inventory at beginning of year, 2 Purchases, 3 Cost of labor, 4 Additional section 263A costs, 5 Other costs, 6 Total, 7 Inventory at end of year, 8 Cost of goods sold. Row 9 is a checkbox question about section 263A rules.

Part IV Rent Income (From Real Property and Personal Property Leased with Real Property)

Table for Rent Income. Row 1: Description of property with checkboxes A, B, C, D. Rows 2-4: Grid for rent received or accrued from personal property, real and personal property, and total rents. Row 3: Total rents received or accrued. Row 4: Deductions directly connected with the income. Row 5: Total deductions.

Part V Unrelated Debt-Financed Income (see instructions)

Table for Unrelated Debt-Financed Income. Row 1: Description of debt-financed property with checkboxes A, B, C, D. Rows 2-8: Grid for gross income from debt-financed property, deductions, and average acquisition debt. Row 6: Percentage calculation. Row 8: Total gross income. Row 9: Allocable deductions. Row 10: Total allocable deductions. Row 11: Total dividends-received deductions.

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| 1. Name of controlled organization | | 2. Employer identification number | Exempt Controlled Organizations | | | 6. Deductions directly connected with income in column 5 |
|------------------------------------|---|-------------------------------------|--|--|---|--|
| | | | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Nonexempt Controlled Organizations | | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | | |
| Totals | | | 0. | 0. | | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | | |
|---|--|---|--|
| 1 | Description of exploited activity: _____ | | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) | 2 | |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) | 3 | |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 | 4 | |
| 5 | Gross income from activity that is not unrelated business income | 5 | |
| 6 | Expenses attributable to income entered on line 5 | 6 | |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 | 7 | |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

- A B C D checkboxes

Enter amounts for each periodical listed above in the corresponding column.

Table with 4 columns (A, B, C, D) for Gross advertising income. Total 0.

Table with 4 columns (A, B, C, D) for Direct advertising costs by periodical. Total 0.

Table with 4 columns (A, B, C, D) for Advertising gain (loss), Readership costs, Circulation income, Excess readership costs, and Excess readership costs allowed as a deduction. Total 0.

Part X Compensation of Officers, Directors, and Trustees (see instructions)

Table with 4 columns: 1. Name, 2. Title, 3. Percentage of time devoted to business, 4. Compensation attributable to unrelated business. Total 407,892.

Part XI Supplemental Information (see instructions)

Blank lines for supplemental information.

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

INCOME (LOSS) FROM PARTNERSHIPS

STATEMENT 16

| DESCRIPTION | NET INCOME OR (LOSS) |
|------------------------|-------------------------|
| G1 - DIVIDEND INCOME | -6. |
| E1 - DIVIDEND INCOME | 94,382. |
| A9 - INTEREST INCOME | 12,564. |
| E6 - INTEREST INCOME | 2. |
| G3 - INTEREST INCOME | 27,240. |
| A21 - INTEREST INCOME | 4. |
| E14 - INTEREST INCOME | 2,128. |
| E15 - INTEREST INCOME | 7,758. |
| E13 - INTEREST INCOME | -9,963. |
| E19 - INTEREST INCOME | 3. |
| A35 - INTEREST INCOME | 2,436. |
| E22 - INTEREST INCOME | 867. |
| A36 - INTEREST INCOME | 35,719. |
| E30 - INTEREST INCOME | 15. |
| A41 - INTEREST INCOME | 2,834. |
| A41 - DIVIDEND INCOME | 1. |
| F20 - INTEREST INCOME | 10. |
| A50 - INTEREST INCOME | 167. |
| E56 - DIVIDEND INCOME | 132. |
| E59 - ROYALTIES | 2,472. |
| E62 - ROYALTIES | 18. |
| A55 - INTEREST INCOME | 1,629. |
| A56 - INTEREST INCOME | 5,147. |
| E71 - INTEREST INCOME | 96. |
| B15 - INTEREST INCOME | 1,517. |
| B15 - DIVIDEND INCOME | 11,611. |
| A57 - INTEREST INCOME | 94. |
| A57 - ROYALTIES | 2,329. |
| A59 - INTEREST INCOME | 11,743. |
| A59 - DIVIDEND INCOME | 471. |
| A60 - INTEREST INCOME | 830. |
| A60 - DIVIDEND INCOME | 15,332. |
| A60 - ROYALTIES | 28. |
| A61 - INTEREST INCOME | 6. |
| A61 - DIVIDEND INCOME | 763. |
| E78A - INTEREST INCOME | 349. |
| E78A - ROYALTIES | 3,727. |
| E84 - INTEREST INCOME | 737. |
| E110 - INTEREST INCOME | 5. |
| E110 - ROYALTIES | 28,252. |
| E109 - ROYALTIES | 37,271. |
| A88 - INTEREST INCOME | 922. |
| A87 - INTEREST INCOME | 6,262. |
| E128 - ROYALTIES | 3,036. |
| E132 - INTEREST INCOME | 8,404. |
| E132 - DIVIDEND INCOME | 43. |
| E132 - ROYALTIES | 12,933. |
| E133 - INTEREST INCOME | 2,879. |
| E133 - DIVIDEND INCOME | 3. |
| E133 - ROYALTIES | 26,642. |
| E134 - INTEREST INCOME | 33. |
| E134 - DIVIDEND INCOME | 4. |

| | |
|--|----------------------------|
| THE J. PAUL GETTY TRUST | 95-1790021 |
| E134 - ROYALTIES | 10,886. |
| E135 - ROYALTIES | -31,047. |
| E136 - DIVIDEND INCOME | 13. |
| C32A - INTEREST INCOME | 6,754. |
| C32B - INTEREST INCOME | 12. |
| C32 - INTEREST INCOME | 112,866. |
| C32 - DIVIDEND INCOME | 53,622. |
| E159 - INTEREST INCOME | 1,381. |
| E162 - INTEREST INCOME | 1,485. |
| C57 - INTEREST INCOME | 6. |
| C58 - INTEREST INCOME | 73,476. |
| E50 - DIVIDEND INCOME | 124. |
| C67 - INTEREST INCOME | 60,317. |
| C67 - DIVIDEND INCOME | 1,661. |
| D32 - INTEREST INCOME | 45. |
| D32 - DIVIDEND INCOME | 4,635. |
| A113F - DIVIDEND INCOME | 7,562. |
| A115A - DIVIDEND INCOME | 516. |
| A115E - INTEREST INCOME | 661. |
| A120A - INTEREST INCOME | 248. |
| A120D - INTEREST INCOME | 12. |
| A120E - INTEREST INCOME | 399. |
| A120H - INTEREST INCOME | 205. |
| A107A - INTEREST INCOME | 30,854. |
| A43 - INTEREST INCOME | 33,896. |
| SCHEDULE E, PAGE 2 - ORDINARY BUSINESS INCOME (LOSS) | -13,397,981. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | <u><u>-12,665,511.</u></u> |

| | | |
|--|-----------------------------------|-------------------------|
| FORM 990-T (A) | INCOME (LOSS) FROM S CORPORATIONS | STATEMENT 17 |
| DESCRIPTION | | NET INCOME OR (LOSS) |
| E65 - DIVIDEND INCOME | | 18,245. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | | <u><u>18,245.</u></u> |

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

OTHER INCOME

STATEMENT 18

| DESCRIPTION | AMOUNT |
|--------------------------------------|------------|
| CANCELLATION OF DEBT - G3 | 6,475. |
| CANCELLATION OF DEBT - E44 | 2,689. |
| CANCELLATION OF DEBT - E45 | 6,142. |
| CANCELLATION OF DEBT - E48A | 45,606. |
| CANCELLATION OF DEBT - E48 | 13,938. |
| CANCELLATION OF DEBT - E55 | 63,525. |
| CANCELLATION OF DEBT - E57 | 92,773. |
| CANCELLATION OF DEBT - E72 | 25,341. |
| CANCELLATION OF DEBT - C49 | 439,344. |
| CANCELLATION OF DEBT - A106 | 221. |
| CANCELLATION OF DEBT - E175A | 997,598. |
| CANCELLATION OF DEBT - E50 | 16,732. |
| CANCELLATION OF DEBT - E61 | 233,395. |
| CANCELLATION OF DEBT - E51 | 3,789. |
| CANCELLATION OF DEBT - A120H | 320,087. |
| TOTAL TO SCHEDULE A, PART I, LINE 12 | 2,267,655. |

FORM 990-T (A)

PART X - COMPENSATION OF OFFICERS,
DIRECTORS AND TRUSTEES

STATEMENT 24

| NAME | TITLE | PERCENT | COMPENSATION |
|---|---------------------------------------|---------|--------------|
| WILLIAM G. HUMPHRIES | CONTROLLER | 4.95% | 14,708. |
| STEVE ALGERT | MANAGING DIRECTOR & ASST TREASURER | 24.21% | 155,430. |
| JAMES M. WILLIAMS | VP, TREASURER & CIO | 5.00% | 58,574. |
| BENJAMIN LIOU | MANAGING DIRECTOR & ASST TREASURER | 23.42% | 179,180. |
| TOTAL TO FORM 990-T, SCHEDULE A, PART X | | | 407,892. |

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY 2

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 450000 | D Sequence: 2 of 6 |

E Describe the unrelated trade or business ▶ **BOOKSTORE SALES**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|---|-----------|-----------------|--------------|-----------------|
| 1 a Gross receipts or sales <u>625,868.</u> | | | | |
| b Less returns and allowances _____ c Balance ▶ | 1c | 625,868. | | |
| 2 Cost of goods sold (Part III, line 8) | 2 | 269,975. | | |
| 3 Gross profit. Subtract line 2 from line 1c | 3 | 355,893. | | 355,893. |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | 4a | | | |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | 4b | | | |
| c Capital loss deduction for trusts | 4c | | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) | 5 | | | |
| 6 Rent income (Part IV) | 6 | | | |
| 7 Unrelated debt-financed income (Part V) | 7 | | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 8 | | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 9 | | | |
| 10 Exploited exempt activity income (Part VIII) | 10 | | | |
| 11 Advertising income (Part IX) | 11 | | | |
| 12 Other income (see instructions; attach statement) | 12 | | | |
| 13 Total. Combine lines 3 through 12 | 13 | 355,893. | | 355,893. |

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

| | | | | |
|--|-----------|-------------------------|--|--------------------|
| 1 Compensation of officers, directors, and trustees (Part X) | 1 | | | |
| 2 Salaries and wages | 2 | | | 809,991. |
| 3 Repairs and maintenance | 3 | | | 35. |
| 4 Bad debts | 4 | | | -94. |
| 5 Interest (attach statement) (see instructions) | 5 | | | |
| 6 Taxes and licenses | 6 | | | 149. |
| 7 Depreciation (attach Form 4562) (see instructions) | 7 | 51,353. | | |
| 8 Less depreciation claimed in Part III and elsewhere on return | 8a | | | 51,353. |
| 9 Depletion | 9 | | | |
| 10 Contributions to deferred compensation plans | 10 | | | |
| 11 Employee benefit programs | 11 | | | 618,935. |
| 12 Excess exempt expenses (Part VIII) | 12 | | | |
| 13 Excess readership costs (Part IX) | 13 | | | |
| 14 Other deductions (attach statement) | 14 | SEE STATEMENT 19 | | 265,555. |
| 15 Total deductions. Add lines 1 through 14 | 15 | | | 1,745,924. |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | 16 | | | -1,390,031. |
| 17 Deduction for net operating loss (see instructions) | 17 | | | 0. |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | 18 | | | -1,390,031. |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

| Part III Cost of Goods Sold | | Enter method of inventory valuation ► N/A | |
|------------------------------------|--|---|---|
| 1 | Inventory at beginning of year | 1 | 451,679. |
| 2 | Purchases | 2 | 387,057. |
| 3 | Cost of labor | 3 | 0. |
| 4 | Additional section 263A costs (attach statement) | 4 | 0. |
| 5 | Other costs (attach statement) | 5 | 0. |
| 6 | Total. Add lines 1 through 5 | 6 | 838,736. |
| 7 | Inventory at end of year | 7 | 568,761. |
| 8 | Cost of goods sold. Subtract line 7 from line 6. Enter here and in Part I, line 2 | 8 | 269,975. |
| 9 | Do the rules of section 263A (with respect to property produced or acquired for resale) apply to the organization? | | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |

| Part IV Rent Income (From Real Property and Personal Property Leased with Real Property) | | | | | |
|--|---|---|---|---|----|
| 1 Description of property (property street address, city, state, ZIP code). Check if a dual-use (see instructions) | | | | | |
| A | <input type="checkbox"/> | | | | |
| B | <input type="checkbox"/> | | | | |
| C | <input type="checkbox"/> | | | | |
| D | <input type="checkbox"/> | | | | |
| | | A | B | C | D |
| 2 | Rent received or accrued | | | | |
| a | From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%) | | | | |
| b | From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income) | | | | |
| c | Total rents received or accrued by property. Add lines 2a and 2b, columns A through D | | | | |
| 3 | Total rents received or accrued. Add line 2c columns A through D. Enter here and on Part I, line 6, column (A) | | | | 0. |
| 4 | Deductions directly connected with the income in lines 2(a) and 2(b) (attach statement) | | | | |
| 5 | Total deductions. Add line 4 columns A through D. Enter here and on Part I, line 6, column (B) | | | | 0. |

| Part V Unrelated Debt-Financed Income (see instructions) | | | | | |
|---|--|---|---|---|----|
| 1 Description of debt-financed property (street address, city, state, ZIP code). Check if a dual-use (see instructions) | | | | | |
| A | <input type="checkbox"/> | | | | |
| B | <input type="checkbox"/> | | | | |
| C | <input type="checkbox"/> | | | | |
| D | <input type="checkbox"/> | | | | |
| | | A | B | C | D |
| 2 | Gross income from or allocable to debt-financed property | | | | |
| 3 | Deductions directly connected with or allocable to debt-financed property | | | | |
| a | Straight line depreciation (attach statement) | | | | |
| b | Other deductions (attach statement) | | | | |
| c | Total deductions (add lines 3a and 3b, columns A through D) | | | | |
| 4 | Amount of average acquisition debt on or allocable to debt-financed property (attach statement) | | | | |
| 5 | Average adjusted basis of or allocable to debt-financed property (attach statement) | | | | |
| 6 | Divide line 4 by line 5 | % | % | % | % |
| 7 | Gross income reportable. Multiply line 2 by line 6 | | | | |
| 8 | Total gross income (add line 7, columns A through D). Enter here and on Part I, line 7, column (A) | | | | 0. |
| 9 | Allocable deductions. Multiply line 3c by line 6 | | | | |
| 10 | Total allocable deductions. Add line 9, columns A through D. Enter here and on Part I, line 7, column (B) | | | | 0. |
| 11 | Total dividends-received deductions included in line 10 | | | | 0. |

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| 1. Name of controlled organization | | 2. Employer identification number | Exempt Controlled Organizations | | | 6. Deductions directly connected with income in column 5 |
|------------------------------------|---|-------------------------------------|--|--|---|--|
| | | | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Nonexempt Controlled Organizations | | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | | |
| Totals | | | 0. | 0. | | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | |
|---|--|---|
| 1 | Description of exploited activity: _____ | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) | 2 |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) | 3 |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 | 4 |
| 5 | Gross income from activity that is not unrelated business income | 5 |
| 6 | Expenses attributable to income entered on line 5 | 6 |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 | 7 |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

| | | |
|---|--------------------------|-------|
| A | <input type="checkbox"/> | _____ |
| B | <input type="checkbox"/> | _____ |
| C | <input type="checkbox"/> | _____ |
| D | <input type="checkbox"/> | _____ |

Enter amounts for each periodical listed above in the corresponding column.

| | A | B | C | D |
|--|---|---|---|----|
| 2 Gross advertising income | | | | |
| Add columns A through D. Enter here and on Part I, line 11, column (A) | | | | 0. |

| a | | | | |
|--|--|--|--|----|
| 3 Direct advertising costs by periodical | | | | |
| a Add columns A through D. Enter here and on Part I, line 11, column (B) | | | | 0. |

| 4 | A | B | C | D |
|---|---|---|---|---|
| 4 Advertising gain (loss). Subtract line 3 from line 2. For any column in line 4 showing a gain, complete lines 5 through 8. For any column in line 4 showing a loss or zero, do not complete lines 5 through 7, and enter zero on line 8 | | | | |

| | | | | |
|--------------------------|--|--|--|--|
| 5 Readership costs | | | | |
|--------------------------|--|--|--|--|

| | | | | |
|----------------------------|--|--|--|--|
| 6 Circulation income | | | | |
|----------------------------|--|--|--|--|

| | | | | |
|--|--|--|--|--|
| 7 Excess readership costs. If line 6 is less than line 5, subtract line 6 from line 5. If line 5 is less than line 6, enter zero | | | | |
|--|--|--|--|--|

| | | | | |
|--|--|--|--|--|
| 8 Excess readership costs allowed as a deduction. For each column showing a gain on line 4, enter the lesser of line 4 or line 7 | | | | |
|--|--|--|--|--|

| | | | | |
|---|--|--|--|----|
| a Add line 8, columns A through D. Enter the greater of the line 8a, columns total or zero here and on Part II, line 13 | | | | 0. |
|---|--|--|--|----|

Part X Compensation of Officers, Directors, and Trustees (see instructions)

| 1. Name | 2. Title | 3. Percentage of time devoted to business | 4. Compensation attributable to unrelated business |
|---------|----------|---|--|
| (1) | | % | |
| (2) | | % | |
| (3) | | % | |
| (4) | | % | |

Total. Enter here and on Part II, line 1

Part XI Supplemental Information (see instructions)

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

OTHER DEDUCTIONS

STATEMENT 19

| DESCRIPTION | AMOUNT |
|---------------------------------------|----------|
| BANK CHARGES | 7,314. |
| DATA PROCESSING | 33,060. |
| DUES & SUBSCRIPTIONS | 569. |
| FURNITURE & EQUIPMENT | 6,361. |
| OCCUPANCY | 12,755. |
| OPERATING SUPPLIES | 14,472. |
| OUTSIDE SERVICES | 13,891. |
| POSTAGE & FREIGHT | 64,016. |
| PRINTING AND PUBLICATIONS | 1,650. |
| PROMOTIONAL AND ADVERTISING | 107,692. |
| RENTAL | 2,441. |
| TRAINING | -103. |
| TRAVEL | 1,437. |
| | |
| TOTAL TO SCHEDULE A, PART II, LINE 14 | 265,555. |

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY 3

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 520000 | D Sequence: 3 of 6 |

E Describe the unrelated trade or business ▶ **E2 PARTNERSHIP INVESTMENT**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|--|--------------------|------------|--------------|---------|
| 1 a Gross receipts or sales | | | | |
| b Less returns and allowances | c Balance ▶ | | | |
| 2 Cost of goods sold (Part III, line 8) | 1c | | | |
| 3 Gross profit. Subtract line 2 from line 1c | 2 | | | |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | 3 | | | |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | 4a | 22,409. | | 22,409. |
| c Capital loss deduction for trusts | 4b | | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 20 | 4c | | | |
| 6 Rent income (Part IV) | 5 | 55,042. | | 55,042. |
| 7 Unrelated debt-financed income (Part V) | 6 | | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 7 | | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 8 | | | |
| 10 Exploited exempt activity income (Part VIII) | 9 | | | |
| 11 Advertising income (Part IX) | 10 | | | |
| 12 Other income (see instructions; attach statement) | 11 | | | |
| 13 Total. Combine lines 3 through 12 | 12 | 77,451. | | 77,451. |
| | 13 | | | |

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

| | | | | |
|--|--|----|--|---------|
| 1 Compensation of officers, directors, and trustees (Part X) | | | | |
| 2 Salaries and wages | | | | |
| 3 Repairs and maintenance | | | | |
| 4 Bad debts | | | | |
| 5 Interest (attach statement) (see instructions) | | | | |
| 6 Taxes and licenses | | | | |
| 7 Depreciation (attach Form 4562) (see instructions) | | 7 | | |
| 8 Less depreciation claimed in Part III and elsewhere on return | | 8a | | 8b |
| 9 Depletion | | | | |
| 10 Contributions to deferred compensation plans | | | | |
| 11 Employee benefit programs | | | | |
| 12 Excess exempt expenses (Part VIII) | | | | |
| 13 Excess readership costs (Part IX) | | | | |
| 14 Other deductions (attach statement) | | | | |
| 15 Total deductions. Add lines 1 through 14 | | | | 0. |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | | | | 77,451. |
| 17 Deduction for net operating loss (see instructions) | | | | 0. |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | | | | 77,451. |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

Part III Cost of Goods Sold

Enter method of inventory valuation

Table with 8 rows for Cost of Goods Sold. Rows include: 1 Inventory at beginning of year, 2 Purchases, 3 Cost of labor, 4 Additional section 263A costs, 5 Other costs, 6 Total, 7 Inventory at end of year, 8 Cost of goods sold. Row 9 is a checkbox question about section 263A rules.

Part IV Rent Income (From Real Property and Personal Property Leased with Real Property)

Table for Rent Income. Row 1: Description of property with checkboxes A, B, C, D. Rows 2-4: Rent received or accrued from personal property, real and personal property, and total rents. Row 3: Total rents received or accrued. Row 4: Deductions directly connected with the income. Row 5: Total deductions.

Part V Unrelated Debt-Financed Income (see instructions)

Table for Unrelated Debt-Financed Income. Row 1: Description of debt-financed property with checkboxes A, B, C, D. Rows 2-8: Gross income from or allocable to debt-financed property, deductions (straight line, other), total deductions, amount of average acquisition debt, average adjusted basis, and gross income reportable. Row 9: Allocable deductions. Row 10: Total allocable deductions. Row 11: Total dividends-received deductions.

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| | | Exempt Controlled Organizations | | | |
|------------------------------------|---|---|--|---|--|
| 1. Name of controlled organization | 2. Employer identification number | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | 6. Deductions directly connected with income in column 5 |
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| Nonexempt Controlled Organizations | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | |
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | |
| Totals | | | 0. | 0. | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | |
|---|--|---|
| 1 | Description of exploited activity: _____ | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) | 2 |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) | 3 |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 | 4 |
| 5 | Gross income from activity that is not unrelated business income | 5 |
| 6 | Expenses attributable to income entered on line 5 | 6 |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 | 7 |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

- A B C D

Enter amounts for each periodical listed above in the corresponding column.

Table with 4 columns (A, B, C, D) and 2 rows (Gross advertising income, Add columns A through D)

Table with 4 columns (A, B, C, D) and 2 rows (Direct advertising costs by periodical, Add columns A through D)

Table with 4 columns (A, B, C, D) and 8 rows (Advertising gain (loss), Readership costs, Circulation income, Excess readership costs, Excess readership costs allowed as a deduction)

Part X Compensation of Officers, Directors, and Trustees (see instructions)

Table with 4 columns (1. Name, 2. Title, 3. Percentage of time devoted to business, 4. Compensation attributable to unrelated business)

Part XI Supplemental Information (see instructions)

Blank lines for supplemental information

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

INCOME (LOSS) FROM PARTNERSHIPS

STATEMENT 20

| DESCRIPTION | NET INCOME OR (LOSS) |
|--|-------------------------|
| SCHEDULE E, PAGE 2 - ORDINARY BUSINESS INCOME (LOSS) | 55,042. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | 55,042. |

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY **4**

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 520000 | D Sequence: 4 of 6 |

E Describe the unrelated trade or business ▶ **G43 PARTNERSHIP INVESTMENT**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|--|-----------|-----------------|--------------|-----------------|
| 1 a Gross receipts or sales _____ | | | | |
| b Less returns and allowances _____ c Balance ▶ | 1c | | | |
| 2 Cost of goods sold (Part III, line 8) | 2 | | | |
| 3 Gross profit. Subtract line 2 from line 1c | 3 | | | |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | 4a | | | |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | 4b | | | |
| c Capital loss deduction for trusts | 4c | | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 21 | 5 | 534,664. | | 534,664. |
| 6 Rent income (Part IV) | 6 | | | |
| 7 Unrelated debt-financed income (Part V) | 7 | | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 8 | | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 9 | | | |
| 10 Exploited exempt activity income (Part VIII) | 10 | | | |
| 11 Advertising income (Part IX) | 11 | | | |
| 12 Other income (see instructions; attach statement) | 12 | | | |
| 13 Total. Combine lines 3 through 12 | 13 | 534,664. | | 534,664. |

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

| | | | | | |
|--|-----------|----------|--|-----------|-----------------|
| 1 Compensation of officers, directors, and trustees (Part X) | | 1 | | | |
| 2 Salaries and wages | | 2 | | | |
| 3 Repairs and maintenance | | 3 | | | |
| 4 Bad debts | | 4 | | | |
| 5 Interest (attach statement) (see instructions) | | 5 | | | |
| 6 Taxes and licenses | | 6 | | | |
| 7 Depreciation (attach Form 4562) (see instructions) | 7 | | | | |
| 8 Less depreciation claimed in Part III and elsewhere on return | 8a | | | 8b | |
| 9 Depletion | | | | 9 | |
| 10 Contributions to deferred compensation plans | | | | 10 | |
| 11 Employee benefit programs | | | | 11 | |
| 12 Excess exempt expenses (Part VIII) | | | | 12 | |
| 13 Excess readership costs (Part IX) | | | | 13 | |
| 14 Other deductions (attach statement) | | | | 14 | |
| 15 Total deductions. Add lines 1 through 14 | | | | 15 | 0. |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | | | | 16 | 534,664. |
| 17 Deduction for net operating loss (see instructions) | | | | 17 | 0. |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | | | | 18 | 534,664. |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

Part III Cost of Goods Sold Enter method of inventory valuation

Table with 8 rows for Cost of Goods Sold. Rows include: 1 Inventory at beginning of year, 2 Purchases, 3 Cost of labor, 4 Additional section 263A costs, 5 Other costs, 6 Total, 7 Inventory at end of year, 8 Cost of goods sold. Row 9 is a checkbox question about section 263A rules.

Part IV Rent Income (From Real Property and Personal Property Leased with Real Property)

Table for Rent Income. Row 1: Description of property with checkboxes A, B, C, D. Rows 2-4: Rent received or accrued from personal/real property and total rents. Row 3: Total rents received or accrued. Row 4: Deductions directly connected with the income. Row 5: Total deductions.

Part V Unrelated Debt-Financed Income (see instructions)

Table for Unrelated Debt-Financed Income. Row 1: Description of debt-financed property with checkboxes A, B, C, D. Rows 2-8: Gross income from debt-financed property, deductions, average acquisition debt, and total gross income. Row 9: Allocable deductions. Row 10: Total allocable deductions. Row 11: Total dividends-received deductions.

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| 1. Name of controlled organization | | 2. Employer identification number | Exempt Controlled Organizations | | | |
|------------------------------------|---|-------------------------------------|--|--|---|--|
| | | | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | 6. Deductions directly connected with income in column 5 |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Nonexempt Controlled Organizations | | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | | |
| Totals | | | 0. | 0. | | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | |
|---|--|---|
| 1 | Description of exploited activity: _____ | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) | 2 |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) | 3 |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 | 4 |
| 5 | Gross income from activity that is not unrelated business income | 5 |
| 6 | Expenses attributable to income entered on line 5 | 6 |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 | 7 |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

- A B C D checkboxes

Enter amounts for each periodical listed above in the corresponding column.

Table with 4 columns (A, B, C, D) and 2 rows (Gross advertising income, Add columns A through D)

Table with 4 columns (A, B, C, D) and 2 rows (Direct advertising costs, Add columns A through D)

Table with 4 columns (A, B, C, D) and 8 rows (Advertising gain/loss, Readership costs, Circulation income, Excess readership costs)

Part X Compensation of Officers, Directors, and Trustees (see instructions)

Table with 4 columns (1. Name, 2. Title, 3. Percentage of time devoted to business, 4. Compensation attributable to unrelated business)

Part XI Supplemental Information (see instructions)

Blank lines for supplemental information

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

INCOME (LOSS) FROM PARTNERSHIPS

STATEMENT 21

| DESCRIPTION | NET INCOME OR (LOSS) |
|--|-------------------------|
| SCHEDULE E, PAGE 2 - ORDINARY BUSINESS INCOME (LOSS) | 534,664. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | 534,664. |

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY 5

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 520000 | D Sequence: 5 of 6 |

E Describe the unrelated trade or business ▶ **E113 PARTNERSHIP INVESTMENT**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|--|-----------|------------|--------------|----------|
| 1 a Gross receipts or sales _____ | | | | |
| b Less returns and allowances _____ c Balance ▶ | 1c | | | |
| 2 Cost of goods sold (Part III, line 8) | 2 | | | |
| 3 Gross profit. Subtract line 2 from line 1c | 3 | | | |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | 4a | | | |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | 4b | | | |
| c Capital loss deduction for trusts | 4c | | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 22 | 5 | 313,588. | | 313,588. |
| 6 Rent income (Part IV) | 6 | | | |
| 7 Unrelated debt-financed income (Part V) | 7 | | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 8 | | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 9 | | | |
| 10 Exploited exempt activity income (Part VIII) | 10 | | | |
| 11 Advertising income (Part IX) | 11 | | | |
| 12 Other income (see instructions; attach statement) | 12 | | | |
| 13 Total. Combine lines 3 through 12 | 13 | 313,588. | | 313,588. |

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

| | | | | | |
|--|-----------|----------|--|-----------|----------|
| 1 Compensation of officers, directors, and trustees (Part X) | | 1 | | | |
| 2 Salaries and wages | | 2 | | | |
| 3 Repairs and maintenance | | 3 | | | |
| 4 Bad debts | | 4 | | | |
| 5 Interest (attach statement) (see instructions) | | 5 | | | |
| 6 Taxes and licenses | | 6 | | | |
| 7 Depreciation (attach Form 4562) (see instructions) | 7 | | | | |
| 8 Less depreciation claimed in Part III and elsewhere on return | 8a | | | 8b | |
| 9 Depletion | | | | 9 | 180,364. |
| 10 Contributions to deferred compensation plans | | | | 10 | |
| 11 Employee benefit programs | | | | 11 | |
| 12 Excess exempt expenses (Part VIII) | | | | 12 | |
| 13 Excess readership costs (Part IX) | | | | 13 | |
| 14 Other deductions (attach statement) | | | | 14 | |
| 15 Total deductions. Add lines 1 through 14 | | | | 15 | 180,364. |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | | | | 16 | 133,224. |
| 17 Deduction for net operating loss (see instructions) | | | | 17 | 0. |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | | | | 18 | 133,224. |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

Part III Cost of Goods Sold

Enter method of inventory valuation

Table with 8 rows for Cost of Goods Sold. Rows include: 1 Inventory at beginning of year, 2 Purchases, 3 Cost of labor, 4 Additional section 263A costs, 5 Other costs, 6 Total, 7 Inventory at end of year, 8 Cost of goods sold. Row 9 is a checkbox question: 'Do the rules of section 263A... apply to the organization?' with Yes/No options.

Part IV Rent Income (From Real Property and Personal Property Leased with Real Property)

Table for Rent Income. Row 1: Description of property with checkboxes A, B, C, D. Rows 2-4: Grid for rent received or accrued from personal property, real and personal property, and total rents. Row 3: Total rents received or accrued. Row 4: Deductions directly connected with the income. Row 5: Total deductions. Total amounts are shown as 0.

Part V Unrelated Debt-Financed Income (see instructions)

Table for Unrelated Debt-Financed Income. Row 1: Description of debt-financed property with checkboxes A, B, C, D. Rows 2-8: Grid for gross income, deductions (straight line, other), average acquisition debt, average adjusted basis, and gross income reportable. Row 9: Allocable deductions. Row 10: Total allocable deductions. Row 11: Total dividends-received deductions. Total amounts are shown as 0.

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| 1. Name of controlled organization | | 2. Employer identification number | Exempt Controlled Organizations | | | 6. Deductions directly connected with income in column 5 |
|------------------------------------|---|-------------------------------------|--|--|---|--|
| | | | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| Nonexempt Controlled Organizations | | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | | |
| (1) | | | | | | |
| (2) | | | | | | |
| (3) | | | | | | |
| (4) | | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | | |
| Totals | | | 0. | 0. | | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | | |
|---|--|---|--|
| 1 | Description of exploited activity: _____ | | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) | 2 | |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) | 3 | |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 | 4 | |
| 5 | Gross income from activity that is not unrelated business income | 5 | |
| 6 | Expenses attributable to income entered on line 5 | 6 | |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 | 7 | |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

- A B C D

Enter amounts for each periodical listed above in the corresponding column.

Table with 4 columns (A, B, C, D) and 2 rows (Gross advertising income, Add columns A through D)

Table with 4 columns (A, B, C, D) and 2 rows (Direct advertising costs by periodical, Add columns A through D)

Table with 4 columns (A, B, C, D) and 8 rows (Advertising gain (loss), Readership costs, Circulation income, Excess readership costs, Excess readership costs allowed as a deduction)

Part X Compensation of Officers, Directors, and Trustees (see instructions)

Table with 4 columns (1. Name, 2. Title, 3. Percentage of time devoted to business, 4. Compensation attributable to unrelated business)

Part XI Supplemental Information (see instructions)

Blank lines for supplemental information

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

INCOME (LOSS) FROM PARTNERSHIPS

STATEMENT 22

| DESCRIPTION | NET INCOME OR (LOSS) |
|--|-------------------------|
| E113 - ROYALTIES | 346,520. |
| SCHEDULE E, PAGE 2 - ORDINARY BUSINESS INCOME (LOSS) | -32,932. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | <u>313,588.</u> |

**SCHEDULE A
(Form 990-T)**

Department of the Treasury
Internal Revenue Service

**Unrelated Business Taxable Income
From an Unrelated Trade or Business**

▶ Go to www.irs.gov/Form990T for instructions and the latest information.
▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

ENTITY 6

OMB No. 1545-0047

2020

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

| | |
|--|--|
| A Name of the organization THE J. PAUL GETTY TRUST | B Employer identification number 95-1790021 |
| C Unrelated business activity code (see instructions) ▶ 520000 | D Sequence: 6 of 6 |

E Describe the unrelated trade or business ▶ **C69 PARTNERSHIP INVESTMENT**

| Part I Unrelated Trade or Business Income | | (A) Income | (B) Expenses | (C) Net |
|--|--------------------|--------------------|--------------|--------------------|
| 1 a Gross receipts or sales | | | | |
| b Less returns and allowances | c Balance ▶ | 1c | | |
| 2 Cost of goods sold (Part III, line 8) | | 2 | | |
| 3 Gross profit. Subtract line 2 from line 1c | | 3 | | |
| 4 a Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions) | | 4a | | |
| b Net gain (loss) (Form 4797) (attach Form 4797) (see instructions) | | 4b | | |
| c Capital loss deduction for trusts | | 4c | | |
| 5 Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 23 | 5 | -1,506,184. | | -1,506,184. |
| 6 Rent income (Part IV) | 6 | | | |
| 7 Unrelated debt-financed income (Part V) | 7 | | | |
| 8 Interest, annuities, royalties, and rents from a controlled organization (Part VI) | 8 | | | |
| 9 Investment income of section 501(c)(7), (9), or (17) organizations (Part VII) | 9 | | | |
| 10 Exploited exempt activity income (Part VIII) | 10 | | | |
| 11 Advertising income (Part IX) | 11 | | | |
| 12 Other income (see instructions; attach statement) | 12 | | | |
| 13 Total. Combine lines 3 through 12 | 13 | -1,506,184. | | -1,506,184. |

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

| | | | | | | | |
|--|--|-----------|--|-----------|-----------|--------------------|--|
| 1 Compensation of officers, directors, and trustees (Part X) | | | | | | | |
| 2 Salaries and wages | | | | 2 | | | |
| 3 Repairs and maintenance | | | | 3 | | | |
| 4 Bad debts | | | | 4 | | | |
| 5 Interest (attach statement) (see instructions) | | | | 5 | | | |
| 6 Taxes and licenses | | | | 6 | | | |
| 7 Depreciation (attach Form 4562) (see instructions) | | 7 | | | | | |
| 8 Less depreciation claimed in Part III and elsewhere on return | | 8a | | | 8b | | |
| 9 Depletion | | | | 9 | | | |
| 10 Contributions to deferred compensation plans | | | | 10 | | | |
| 11 Employee benefit programs | | | | 11 | | | |
| 12 Excess exempt expenses (Part VIII) | | | | 12 | | | |
| 13 Excess readership costs (Part IX) | | | | 13 | | | |
| 14 Other deductions (attach statement) | | | | 14 | | | |
| 15 Total deductions. Add lines 1 through 14 | | | | 15 | | 0. | |
| 16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C) | | | | 16 | | -1,506,184. | |
| 17 Deduction for net operating loss (see instructions) | | | | 17 | | 0. | |
| 18 Unrelated business taxable income. Subtract line 17 from line 16 | | | | 18 | | -1,506,184. | |

LHA For Paperwork Reduction Act Notice, see instructions.

Schedule A (Form 990-T) 2020

Part III Cost of Goods Sold

Enter method of inventory valuation

Table with 8 rows for Cost of Goods Sold. Rows include: 1 Inventory at beginning of year, 2 Purchases, 3 Cost of labor, 4 Additional section 263A costs, 5 Other costs, 6 Total, 7 Inventory at end of year, 8 Cost of goods sold. Row 9 is a checkbox question about section 263A rules.

Part IV Rent Income (From Real Property and Personal Property Leased with Real Property)

Table for Rent Income. Row 1: Description of property with checkboxes A, B, C, D. Rows 2-4: Rent received or accrued from personal property, real and personal property, and total rents. Row 3: Total rents received or accrued. Row 4: Deductions directly connected with the income. Row 5: Total deductions.

Part V Unrelated Debt-Financed Income (see instructions)

Table for Unrelated Debt-Financed Income. Row 1: Description of debt-financed property with checkboxes A, B, C, D. Rows 2-8: Gross income from or allocable to debt-financed property, deductions (depreciation, other), amount of average acquisition debt, average adjusted basis, and total gross income. Row 9: Allocable deductions. Row 10: Total allocable deductions. Row 11: Total dividends-received deductions.

Part VI Interest, Annuities, Royalties, and Rents from Controlled Organizations (see instructions)

| | | Exempt Controlled Organizations | | | |
|------------------------------------|---|---|--|---|--|
| 1. Name of controlled organization | 2. Employer identification number | 3. Net unrelated income (loss) (see instructions) | 4. Total of specified payments made | 5. Part of column 4 that is included in the controlling organization's gross income | 6. Deductions directly connected with income in column 5 |
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| Nonexempt Controlled Organizations | | | | | |
| 7. Taxable Income | 8. Net unrelated income (loss) (see instructions) | 9. Total of specified payments made | 10. Part of column 9 that is included in the controlling organization's gross income | 11. Deductions directly connected with income in column 10 | |
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| | | | Add columns 5 and 10. Enter here and on Part I, line 8, column (A) | Add columns 6 and 11. Enter here and on Part I, line 8, column (B) | |
| Totals | | | 0. | 0. | |

Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

| 1. Description of income | 2. Amount of income | 3. Deductions directly connected (attach statement) | 4. Set-asides (attach statement) | 5. Total deductions and set-asides (add cols 3 and 4) |
|--------------------------|---------------------|---|----------------------------------|---|
| (1) | | | | |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| | | Add amounts in column 2. Enter here and on Part I, line 9, column (A) | | Add amounts in column 5. Enter here and on Part I, line 9, column (B) |
| Totals | | 0. | | 0. |

Part VIII Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

| | | |
|---|--|---|
| 1 | Description of exploited activity: _____ | |
| 2 | Gross unrelated business income from trade or business. Enter here and on Part I, line 10, column (A) _____ | 2 |
| 3 | Expenses directly connected with production of unrelated business income. Enter here and on Part I, line 10, column (B) _____ | 3 |
| 4 | Net income (loss) from unrelated trade or business. Subtract line 3 from line 2. If a gain, complete lines 5 through 7 _____ | 4 |
| 5 | Gross income from activity that is not unrelated business income _____ | 5 |
| 6 | Expenses attributable to income entered on line 5 _____ | 6 |
| 7 | Excess exempt expenses. Subtract line 5 from line 6, but do not enter more than the amount on line 4. Enter here and on Part II, line 12 _____ | 7 |

Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.

- A
- B
- C
- D

Enter amounts for each periodical listed above in the corresponding column.

| | A | B | C | D |
|--|---|---|---|----|
| 2 Gross advertising income | | | | |
| Add columns A through D. Enter here and on Part I, line 11, column (A) | | | | 0. |

a

| | | | | |
|--|--|--|--|----|
| 3 Direct advertising costs by periodical | | | | |
| a Add columns A through D. Enter here and on Part I, line 11, column (B) | | | | 0. |

4 Advertising gain (loss). Subtract line 3 from line 2. For any column in line 4 showing a gain, complete lines 5 through 8. For any column in line 4 showing a loss or zero, do not complete lines 5 through 7, and enter zero on line 8

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|

5 Readership costs

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|

6 Circulation income

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|

7 Excess readership costs. If line 6 is less than line 5, subtract line 6 from line 5. If line 5 is less than line 6, enter zero

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|

8 Excess readership costs allowed as a deduction. For each column showing a gain on line 4, enter the lesser of line 4 or line 7

| | | | | |
|--|--|--|--|--|
| | | | | |
|--|--|--|--|--|

a Add line 8, columns A through D. Enter the greater of the line 8a, columns total or zero here and on Part II, line 13

| | | | | |
|--|--|--|--|----|
| | | | | 0. |
|--|--|--|--|----|

Part X Compensation of Officers, Directors, and Trustees (see instructions)

| 1. Name | 2. Title | 3. Percentage of time devoted to business | 4. Compensation attributable to unrelated business |
|---------|----------|---|--|
| (1) | | % | |
| (2) | | % | |
| (3) | | % | |
| (4) | | % | |

Total. Enter here and on Part II, line 1

| | | | |
|--|--|--|----|
| | | | 0. |
|--|--|--|----|

Part XI Supplemental Information (see instructions)

THE J. PAUL GETTY TRUST

95-1790021

FORM 990-T (A)

INCOME (LOSS) FROM PARTNERSHIPS

STATEMENT 23

| DESCRIPTION | NET INCOME OR (LOSS) |
|--|-------------------------|
| SCHEDULE E, PAGE 2 - ORDINARY BUSINESS INCOME (LOSS) | -1,506,184. |
| TOTAL INCLUDED ON SCHEDULE A, PART I, LINE 5 | -1,506,184. |

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

Your social security number

THE J. PAUL GETTY TRUST

95-1790021

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, receive a distribution, dispose of stock, or receive a loan repayment from an S corporation, you must check the box in column (e) on line 28 and attach the required basis computation. If you report a loss from an at-risk activity for which any amount is not at risk, you must check the box in column (f) 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 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? If you answered "Yes," see instructions before completing this section Yes No

Table with 6 columns: (a) Name, (b) Enter P for partnership, S for S corporation, (c) Check if foreign partnership, (d) Employer identification number, (e) Check if basis computation is required, (f) Check if any amount is not at risk. Row A: SEE STATEMENT 25

Table with 5 columns: (g) Passive loss allowed, (h) Passive income from Schedule K-1, (i) Nonpassive loss allowed, (j) Section 179 expense deduction, (k) Nonpassive income from Schedule K-1. Totals: 955,915, 33,807,135, 19,459,744, 34,763,050, -15,303,306

Part III Income or Loss From Estates and Trusts

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

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

Summary table with 2 columns: Description, Amount. Rows 40-43. Total income or loss: -15,303,306

**SCHEDULE I
(Form 1041)**

Alternative Minimum Tax - Estates and Trusts

OMB No. 1545-0092

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1041.

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

2020

Name of estate or trust

THE J. PAUL GETTY TRUST

Employer identification number

95-1790021

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

| | | | |
|--|--|----|---------------------|
| 1 | Adjusted total income or (loss) (from Form 1041, line 17). ESBTs , see instructions | 1 | |
| 2 | Interest | 2 | |
| 3 | Taxes | 3 | |
| 4 | Refund of taxes | 4 | () |
| 5 | Depletion (difference between regular tax and AMT) | 5 | |
| 6 | Net operating loss deduction. Enter as a positive amount | 6 | 745,339. |
| 7 | Interest from specified private activity bonds exempt from the regular tax | 7 | |
| 8 | Qualified small business stock (see instructions) | 8 | |
| 9 | Exercise of incentive stock options (excess of AMT income over regular tax income) | 9 | |
| 10 | Other estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A) | 10 | |
| 11 | Disposition of property (difference between AMT and regular tax gain or loss) | 11 | |
| 12 | Depreciation on assets placed in service after 1986 (difference between regular tax and AMT) | 12 | -5,671. |
| 13 | Passive activities (difference between AMT and regular tax income or loss) | 13 | |
| 14 | Loss limitations (difference between AMT and regular tax income or loss) | 14 | |
| 15 | Circulation costs (difference between regular tax and AMT) | 15 | |
| 16 | Long-term contracts (difference between AMT and regular tax income) | 16 | |
| 17 | Mining costs (difference between regular tax and AMT) | 17 | |
| 18 | Research and experimental costs (difference between regular tax and AMT) | 18 | |
| 19 | Income from certain installment sales before January 1, 1987 | 19 | () |
| 20 | Intangible drilling costs preference | 20 | |
| 21 | Other adjustments, including income-based related adjustments | 21 | |
| 22 | Alternative tax net operating loss deduction (See the instructions for the limitation that applies.) | 22 | (476,094.) |
| 23 | Adjusted alternative minimum taxable income. Combine lines 1 through 22 | 23 | 263,574. |
| Note: Complete Part II below before going to line 24. | | | |
| 24 | Income distribution deduction from Part II, line 42 | 24 | N/A |
| 25 | Estate tax deduction (from Form 1041, line 19) | 25 | N/A |
| 26 | Add lines 24 and 25 | 26 | |
| 27 | Estate's or trust's share of alternative minimum taxable income. Subtract line 26 from line 23 | 27 | 263,574. |

If line 27 is:

- \$25,400 or less, stop here and enter -0- on Form 1041, Schedule G, line 1c. The estate or trust isn't liable for the alternative minimum tax.
- Over \$25,400, but less than \$186,400, go to line 43.
- \$186,400 or more, enter the amount from line 27 on line 49 and go to line 50.
- **ESBTs**, see instructions.

Part II Income Distribution Deduction on a Minimum Tax Basis

N/A

| | | | |
|----|---|----|-----|
| 28 | Adjusted alternative minimum taxable income (see instructions) | 28 | |
| 29 | Adjusted tax-exempt interest (other than amounts included on line 7) | 29 | |
| 30 | Total net gain from Schedule D (Form 1041), line 19, column (1). If a loss, enter -0- | 30 | |
| 31 | Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes (from Form 1041, Schedule A, line 4) | 31 | |
| 32 | Capital gains paid or permanently set aside for charitable purposes from gross income (see instructions) | 32 | |
| 33 | Capital gains computed on a minimum tax basis included on line 23 | 33 | () |
| 34 | Capital losses computed on a minimum tax basis included on line 23. Enter as a positive amount | 34 | |
| 35 | Distributable net alternative minimum taxable income (DNAMTI). Combine lines 28 through 34. If zero or less, enter -0- | 35 | |
| 36 | Income required to be distributed currently (from Form 1041, Schedule B, line 9) | 36 | |
| 37 | Other amounts paid, credited, or otherwise required to be distributed (from Form 1041, Schedule B, line 10) | 37 | |
| 38 | Total distributions. Add lines 36 and 37 | 38 | |
| 39 | Tax-exempt income included on line 38 (other than amounts included on line 7) | 39 | |
| 40 | Tentative income distribution deduction on a minimum tax basis. Subtract line 39 from line 38 | 40 | |

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

Schedule I (Form 1041) 2020

| | | |
|---|----|-----|
| Part II Income Distribution Deduction on a Minimum Tax Basis (continued) | | N/A |
| 41 Tentative income distribution deduction on a minimum tax basis. Subtract line 29 from line 35. If zero or less, enter -0- | 41 | |
| 42 Income distribution deduction on a minimum tax basis. Enter the smaller of line 40 or line 41. Enter here and on line 24 | 42 | |

| | | |
|--|----|----------|
| Part III Alternative Minimum Tax | | |
| 43 Exemption amount | 43 | \$25,400 |
| 44 Enter the amount from line 27 | 44 | |
| 45 Phase-out of exemption amount | 45 | \$84,800 |
| 46 Subtract line 45 from line 44. If zero or less, enter -0- | 46 | |
| 47 Multiply line 46 by 25% (0.25) | 47 | |
| 48 Subtract line 47 from line 43. If zero or less, enter -0- | 48 | |
| 49 Subtract line 48 from line 44 | 49 | 263,574. |
| 50 Go to Part IV of Schedule I to figure line 50 if the estate or trust has qualified dividends or has a gain on lines 18a and 19 of column (2) of Schedule D (Form 1041) (as refigured for the AMT, if necessary). Otherwise, if line 49 is: • \$197,900 or less, multiply line 49 by 26% (0.26). • Over \$197,900, multiply line 49 by 28% (0.28) and subtract \$3,958 from the result | 50 | 69,843. |
| 51 Alternative minimum foreign tax credit (see instructions) | 51 | 58,688. |
| 52 Tentative minimum tax. Subtract line 51 from line 50 | 52 | 11,155. |
| 53 Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Schedule G, line 2a) | 53 | 0. |
| 54 Alternative minimum tax. Subtract line 53 from line 52. If zero or less, enter -0-. Enter here and on Form 1041, Schedule G, line 1c | 54 | 11,155. |

| | | |
|--|----|---------|
| Part IV Line 50 Computation Using Maximum Capital Gains Rates | | |
| Caution: If you didn't complete Part V of Schedule D (Form 1041), the Schedule D Tax Worksheet, or the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, see the instructions before completing this part. | | |
| 55 Enter the amount from line 49 | 55 | |
| 56 Enter the amount from line 26 of Schedule D (Form 1041), line 13 of the Schedule D Tax Worksheet, or line 4 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as refigured for the AMT, if necessary) | 56 | |
| 57 Enter the amount from Schedule D (Form 1041), line 18b, column (2) (as refigured for the AMT, if necessary). If you didn't complete Schedule D for the regular tax or the AMT, enter -0- | 57 | |
| 58 If you didn't complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 56. Otherwise, add lines 56 and 57 and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary) | 58 | |
| 59 Enter the smaller of line 55 or line 58 | 59 | |
| 60 Subtract line 59 from line 55 | 60 | |
| 61 If line 60 is \$197,900 or less, multiply line 60 by 26% (0.26). Otherwise, multiply line 60 by 28% (0.28) and subtract \$3,958 from the result | 61 | |
| 62 Maximum amount subject to the 0% rate | 62 | \$2,650 |
| 63 Enter the amount from line 27 of Schedule D (Form 1041), line 14 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as figured for the regular tax). If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 23; if zero or less, enter -0- | 63 | |
| 64 Subtract line 63 from line 62. If zero or less, enter -0- | 64 | |
| 65 Enter the smaller of line 55 or line 56 | 65 | |
| 66 Enter the smaller of line 64 or line 65. This amount is taxed at 0% | 66 | |
| 67 Subtract line 66 from line 65 | 67 | |

Part IV Line 50 Computation Using Maximum Capital Gains Rates *(continued)*

| | | | |
|---|-----------|----------|-----------|
| 68 Maximum amount subject to rates below 20% | 68 | \$13,150 | |
| 69 Enter the amount from line 64 | 69 | | |
| 70 Enter the amount from line 27 of Schedule D (Form 1041), line 18 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet, whichever applies (as figured for the regular tax). If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 23; if zero or less, enter -0- | 70 | | |
| 71 Add line 69 and line 70 | 71 | | |
| 72 Subtract line 71 from line 68. If zero or less, enter -0- | 72 | | |
| 73 Enter the smaller of line 67 or 72 | 73 | | |
| 74 Multiply line 73 by 15% (0.15) | | | 74 |
| 75 Add lines 66 and 73 | 75 | | |
| If lines 75 and 55 are the same, skip lines 76 through 80 and go to line 81. Otherwise, go to line 76. | | | |
| 76 Subtract line 75 from line 65 | 76 | | |
| 77 Multiply line 76 by 20% (0.20) | | | 77 |
| If line 57 is zero or blank, skip lines 78 through 80 and go to line 81. Otherwise, go to line 78. | | | |
| 78 Add lines 60, 75, and 76 | 78 | | |
| 79 Subtract line 78 from line 55 | 79 | | |
| 80 Multiply line 79 by 25% (0.25) | | | 80 |
| 81 Add lines 61, 74, 77, and 80 | | | 81 |
| 82 If line 55 is \$197,900 or less, multiply line 55 by 26% (0.26). Otherwise, multiply line 55 by 28% (0.28) and subtract \$3,958 from the result | | | 82 |
| 83 Enter the smaller of line 81 or line 82 here and on line 50 | | | 83 |

Schedule I (Form 1041) 2020

Form **1116**
Department of the Treasury
Internal Revenue Service (99)

Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.
▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

OMB No. 1545-0121

2020
Attachment
Sequence No. **19**

Name **THE J. PAUL GETTY TRUST** Identifying number as shown on page 1 of your tax return **95-1790021**

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 Section 951A category income c Passive category income e Section 901(j) income g Lump-sum distributions
b Foreign branch category income d General category income f Certain income re-sourced by treaty

h 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 | |
| i Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES | | | | |
| 1a Gross income from sources within country shown above and of the type checked above: | | | | |
| | 14,034,347. | | | 1a 14,034,347. |
| 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 27 | 13,237,115. | | | |
| 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 | 14,034,347. | | | |
| e Gross income from all sources | 71,146,012. | | | |
| f Divide line 3d by line 3e | .19726 | | | |
| 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 | 668,290. | | | |
| 5 Losses from foreign sources | | | | |
| 6 Add lines 2, 3g, 4a, 4b, and 5 | 13,905,405. | | | 6 13,905,405. |
| 7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶ | | | | 7 128,942. |

Part II Foreign Taxes Paid or Accrued

| Country | Credit is claimed for taxes (you must check one) (j) <input type="checkbox"/> Paid (k) <input checked="" type="checkbox"/> Accrued | Foreign taxes paid or accrued | | | | | | | | | |
|--|--|-------------------------------|-------------------------|--------------|--|---|------------------------------|-------------------------|--------------|---|---|
| | | In foreign currency | | | | In U.S. dollars | | | | | |
| | | Taxes withheld at source on: | | | | (p) Other foreign taxes paid or accrued | Taxes withheld at source on: | | | (t) Other foreign taxes paid or accrued | (u) Total foreign taxes paid or accrued (add cols. (q) through (t)) |
| | (l) Date paid or accrued | (m) Dividends | (n) Rents and royalties | (o) Interest | | | (q) Dividends | (r) Rents and royalties | (s) Interest | | |
| A | 12/31/20 | | | | | | | | | 3282147. | 3282147. |
| B | | | | | | | | | | | |
| C | | | | | | | | | | | |
| 8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 ▶ | | | | | | | | | | 8 3282147. | |

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2020)

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 | 3,282,147. | |
| 10 | Carryback or carryover (attach detailed computation) SEE STATEMENT 28 (If your income was section 951A category income (box a above Part I), leave line 10 blank.) | 10 | 31,237,007. | |
| 11 | Add lines 9 and 10 | 11 | 34,519,154. | |
| 12 | Reduction in foreign taxes | 12 | 188. | |
| 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 | | 34,518,966. |
| 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 | 128,942. | |
| 16 | Adjustments to line 15 | 16 | | |
| 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 24. However, if you are filing more than one Form 1116, you must complete line 20.) | 17 | 128,942. | |
| 18 | Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption | 18 | -13,468,106. | |
| Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions. | | | | |
| 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 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 | 20 | | |
| Caution: If you are completing line 20 for separate category g (lump-sum distributions), see instructions. | | | | |
| 21 | Multiply line 20 by line 19 (maximum amount of credit) | 21 | | |
| 22 | Increase in limitation (section 960(c)) | 22 | | |
| 23 | Add lines 21 and 22 | 23 | | |
| 24 | Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV | 24 | | 0. |

Part IV Summary of Credits From Separate Parts III

| | | | | |
|-----------|--|-----------|--|----|
| 25 | Credit for taxes on section 951A category income | 25 | | |
| 26 | Credit for taxes on foreign branch category income | 26 | | |
| 27 | Credit for taxes on passive category income | 27 | | |
| 28 | Credit for taxes on general category income | 28 | | |
| 29 | Credit for taxes on section 901(j) income | 29 | | |
| 30 | Credit for taxes on certain income re-sourced by treaty | 30 | | |
| 31 | Credit for taxes on lump-sum distributions | 31 | | |
| 32 | Add lines 25 through 31 | 32 | | |
| 33 | Enter the smaller of line 20 or line 32 | 33 | | 0. |
| 34 | Reduction of credit for international boycott operations | 34 | | |
| 35 | Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a | 35 | | 0. |

Form **1116**
Department of the Treasury
Internal Revenue Service (99)

Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.
▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

OMB No. 1545-0121

2020
Attachment
Sequence No. **19**

Name **THE J. PAUL GETTY TRUST** Identifying number as shown on page 1 of your tax return **95-1790021**

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 Section 951A category income c Passive category income e Section 901(j) income g Lump-sum distributions
b Foreign branch category income d General category income f Certain income re-sourced by treaty

h 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 | |
| i Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES | | | | |
| 1a Gross income from sources within country shown above and of the type checked above: | | | | |
| | 186,354. | | | 1a 186,354. |
| 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) | 93,902. | | | |
| 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 | 186,354. | | | |
| e Gross income from all sources | 71,146,012. | | | |
| f Divide line 3d by line 3e | .00262 | | | |
| 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 | 93,902. | | | 6 93,902. |
| 7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 | | | | 7 92,452. |

Part II Foreign Taxes Paid or Accrued

| Country | Credit is claimed for taxes (you must check one) (j) <input type="checkbox"/> Paid (k) <input checked="" type="checkbox"/> Accrued | Foreign taxes paid or accrued | | | | | | | | |
|--|--|-------------------------------|-------------------------|--------------|---|------------------------------|---------------|-------------------------|---|---|
| | | In foreign currency | | | | In U.S. dollars | | | | |
| | | Taxes withheld at source on: | | | (p) Other foreign taxes paid or accrued | Taxes withheld at source on: | | | (t) Other foreign taxes paid or accrued | (u) Total foreign taxes paid or accrued (add cols. (q) through (t)) |
| | (l) Date paid or accrued | (m) Dividends | (n) Rents and royalties | (o) Interest | | | (q) Dividends | (r) Rents and royalties | | |
| A | 12/31/20 | | | | | | | | 34,678. | 34,678. |
| B | | | | | | | | | | |
| C | | | | | | | | | | |
| 8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 | | | | | | | | | 8 34,678. | |

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2020)

| 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 | 34,678. |
| 10 | Carryback or carryover (attach detailed computation) SEE STATEMENT 29 (If your income was section 951A category income (box a above Part I), leave line 10 blank.) | 10 | 1,748,914. |
| 11 | Add lines 9 and 10 | 11 | 1,783,592. |
| 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 | 1,783,592. |
| 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 | 92,452. |
| 16 | Adjustments to line 15 | 16 | |
| 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 24. However, if you are filing more than one Form 1116, you must complete line 20.) | 17 | 92,452. |
| 18 | Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption | 18 | -13,468,106. |
| Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions. | | | |
| 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 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 | 20 | |
| Caution: If you are completing line 20 for separate category g (lump-sum distributions), see instructions. | | | |
| 21 | Multiply line 20 by line 19 (maximum amount of credit) | 21 | |
| 22 | Increase in limitation (section 960(c)) | 22 | |
| 23 | Add lines 21 and 22 | 23 | |
| 24 | Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV | 24 | 0. |
| Part IV Summary of Credits From Separate Parts III | | | |
| 25 | Credit for taxes on section 951A category income | 25 | |
| 26 | Credit for taxes on foreign branch category income | 26 | |
| 27 | Credit for taxes on passive category income | 27 | |
| 28 | Credit for taxes on general category income | 28 | |
| 29 | Credit for taxes on section 901(j) income | 29 | |
| 30 | Credit for taxes on certain income re-sourced by treaty | 30 | |
| 31 | Credit for taxes on lump-sum distributions | 31 | |
| 32 | Add lines 25 through 31 | 32 | |
| 33 | Enter the smaller of line 20 or line 32 | 33 | |
| 34 | Reduction of credit for international boycott operations | 34 | |
| 35 | Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a | 35 | |

ALT MIN TAX
Foreign Tax Credit

(Individual, Estate, or Trust)

OMB No. 1545-0121

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.
▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

2020
Attachment
Sequence No. **19**

Name **THE J. PAUL GETTY TRUST** Identifying number as shown on page 1 of your tax return **95-1790021**

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 Section 951A category income c Passive category income e Section 901(j) income g Lump-sum distributions
b Foreign branch category income d General category income f Certain income re-sourced by treaty

h 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 | |
| i Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES | | | | |
| 1a Gross income from sources within country shown above and of the type checked above: _____ | 14,034,347. | | | 1a 14,034,347. |
| 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) STATEMENT 30 | 13,237,115. | | | |
| 3 Pro rata share of other deductions not definitely related: | | | | |
| a Certain itemized deductions or standard deduction | | | | |
| b Other deductions (attach statement) | 0. | | | |
| c Add lines 3a and 3b | | | | |
| d Gross foreign source income | | | | |
| e Gross income from all sources | 71,146,012. | | | |
| f Divide line 3d by line 3e | | | | |
| 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 | 668,290. | | | |
| 5 Losses from foreign sources | 0. | | | |
| 6 Add lines 2, 3g, 4a, 4b, and 5 | 13,905,405. | | | 6 13,905,405. |
| 7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 | | | | 7 128,942. |

Part II Foreign Taxes Paid or Accrued

| Country | Credit is claimed for taxes (you must check one) (j) <input type="checkbox"/> Paid (k) <input checked="" type="checkbox"/> Accrued | Foreign taxes paid or accrued | | | | | | | | |
|--|--|-------------------------------|-------------------------|--------------|--|---|------------------------------|--------------|-----------------|---|
| | | In foreign currency | | | | In U.S. dollars | | | | |
| | | Taxes withheld at source on: | | | | (p) Other foreign taxes paid or accrued | Taxes withheld at source on: | | | (t) Other foreign taxes paid or accrued |
| | (l) Date paid or accrued | (m) Dividends | (n) Rents and royalties | (o) Interest | | (q) Dividends | (r) Rents and royalties | (s) Interest | | |
| A | 12/31/20 | | | | | | | | 3282147. | 3282147. |
| B | | | | | | | | | | |
| C | | | | | | | | | | |
| 8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 | | | | | | | | | | 8 3282147. |

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2020)

ALT MIN 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 | 3,282,147. |
| 10 | Carryback or carryover (attach detailed computation) STATEMENT 31 (If your income was section 951A category income (box a above Part I), leave line 10 blank.) | 10 | 31,237,007. |
| 11 | Add lines 9 and 10 | 11 | 34,519,154. |
| 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 | 34,519,154. |
| 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 | 128,942. |
| 16 | Adjustments to line 15 | 16 | |
| 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 24. However, if you are filing more than one Form 1116, you must complete line 20.) | 17 | 128,942. |
| 18 | Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption | 18 | 263,574. |
| Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions. | | | |
| 19 | Divide line 17 by line 18. If line 17 is more than line 18, enter "1" | 19 | .48920 |
| 20 | Individuals: Enter the total of Form 1040 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 | 20 | 69,843. |
| Caution: If you are completing line 20 for separate category g (lump-sum distributions), see instructions. | | | |
| 21 | Multiply line 20 by line 19 (maximum amount of credit) | 21 | 34,167. |
| 22 | Increase in limitation (section 960(c)) | 22 | |
| 23 | Add lines 21 and 22 | 23 | 34,167. |
| 24 | Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV | 24 | 34,167. |
| Part IV Summary of Credits From Separate Parts III | | | |
| 25 | Credit for taxes on section 951A category income | 25 | |
| 26 | Credit for taxes on foreign branch category income | 26 | |
| 27 | Credit for taxes on passive category income | 27 | 34,167. |
| 28 | Credit for taxes on general category income | 28 | 24,501. |
| 29 | Credit for taxes on section 901(j) income | 29 | |
| 30 | Credit for taxes on certain income re-sourced by treaty | 30 | |
| 31 | Credit for taxes on lump-sum distributions | 31 | |
| 32 | Add lines 25 through 31 | 32 | 58,668. |
| 33 | Enter the smaller of line 20 or line 32 | 33 | 58,668. |
| 34 | Reduction of credit for international boycott operations | 34 | |
| 35 | Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a | 35 | 0. |

ALT MIN TAX
Foreign Tax Credit

(Individual, Estate, or Trust)

OMB No. 1545-0121

Form **1116**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040-SR, 1040-NR, 1041, or 990-T.
▶ Go to www.irs.gov/Form1116 for instructions and the latest information.

2020
Attachment
Sequence No. **19**

Name **THE J. PAUL GETTY TRUST** Identifying number as shown on page 1 of your tax return **95-1790021**

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 Section 951A category income c Passive category income e Section 901(j) income g Lump-sum distributions
b Foreign branch category income d General category income f Certain income re-sourced by treaty

h 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 | |
| i Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES | | | | |
| 1a Gross income from sources within country shown above and of the type checked above: | 186,354. | | | 1a 186,354. |
| 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) | 93,902. | | | |
| 3 Pro rata share of other deductions not definitely related: | | | | |
| a Certain itemized deductions or standard deduction | | | | |
| b Other deductions (attach statement) | 0. | | | |
| c Add lines 3a and 3b | | | | |
| d Gross foreign source income | | | | |
| e Gross income from all sources | 71,146,012. | | | |
| f Divide line 3d by line 3e | | | | |
| 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 | 0. | | | |
| 5 Losses from foreign sources | 0. | | | |
| 6 Add lines 2, 3g, 4a, 4b, and 5 | 93,902. | | | 6 93,902. |
| 7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 | | | | 7 92,452. |

Part II Foreign Taxes Paid or Accrued

| Country | Credit is claimed for taxes (you must check one) (j) <input type="checkbox"/> Paid (k) <input checked="" type="checkbox"/> Accrued | Foreign taxes paid or accrued | | | | | | | | |
|--|--|-------------------------------|-------------------------|--------------|---|------------------------------|---------------|-------------------------|---|---|
| | | In foreign currency | | | | In U.S. dollars | | | | |
| | | Taxes withheld at source on: | | | (p) Other foreign taxes paid or accrued | Taxes withheld at source on: | | | (t) Other foreign taxes paid or accrued | (u) Total foreign taxes paid or accrued (add cols. (q) through (t)) |
| | (l) Date paid or accrued | (m) Dividends | (n) Rents and royalties | (o) Interest | | | (q) Dividends | (r) Rents and royalties | | |
| A | 12/31/20 | | | | | | | | 34,678. | 34,678. |
| B | | | | | | | | | | |
| C | | | | | | | | | | |
| 8 Add lines A through C, column (u). Enter the total here and on line 9, page 2 | | | | | | | | | 8 34,678. | |

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2020)

ALT MIN 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 | 34,678. |
| 10 | Carryback or carryover (attach detailed computation) STATEMENT 32 (If your income was section 951A category income (box a above Part I), leave line 10 blank.) | 10 | 1,748,914. |
| 11 | Add lines 9 and 10 | 11 | 1,783,592. |
| 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 | 1,783,592. |
| 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 | 92,452. |
| 16 | Adjustments to line 15 | 16 | |
| 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 24. However, if you are filing more than one Form 1116, you must complete line 20.) | 17 | 92,452. |
| 18 | Individuals: Enter the amount from line 15 of your Form 1040, 1040-SR, or 1040-NR. Estates and trusts: Enter your taxable income without the deduction for your exemption | 18 | 263,574. |
| Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions. | | | |
| 19 | Divide line 17 by line 18. If line 17 is more than line 18, enter "1" | 19 | .35080 |
| 20 | Individuals: Enter the total of Form 1040 or 1040-SR, line 16, and Schedule 2 (Form 1040), line 2. If you are a nonresident alien, enter the total of Form 1040-NR, line 16 and Schedule 2 (Form 1040), line 2. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a; or the total of Form 990-T, Part II, lines 2, 3, 4, and 6. Foreign estates and trusts should enter the amount from Form 1040-NR, line 16 | 20 | 69,843. |
| Caution: If you are completing line 20 for separate category g (lump-sum distributions), see instructions. | | | |
| 21 | Multiply line 20 by line 19 (maximum amount of credit) | 21 | 24,501. |
| 22 | Increase in limitation (section 960(c)) | 22 | |
| 23 | Add lines 21 and 22 | 23 | 24,501. |
| 24 | Enter the smaller of line 14 or line 23. If this is the only Form 1116 you are filing, skip lines 25 through 32 and enter this amount on line 33. Otherwise, complete the appropriate line in Part IV | 24 | 24,501. |
| Part IV Summary of Credits From Separate Parts III | | | |
| 25 | Credit for taxes on section 951A category income | 25 | |
| 26 | Credit for taxes on foreign branch category income | 26 | |
| 27 | Credit for taxes on passive category income | 27 | |
| 28 | Credit for taxes on general category income | 28 | |
| 29 | Credit for taxes on section 901(j) income | 29 | |
| 30 | Credit for taxes on certain income re-sourced by treaty | 30 | |
| 31 | Credit for taxes on lump-sum distributions | 31 | |
| 32 | Add lines 25 through 31 | 32 | |
| 33 | Enter the smaller of line 20 or line 32 | 33 | |
| 34 | Reduction of credit for international boycott operations | 34 | |
| 35 | Subtract line 34 from line 33. This is your foreign tax credit . Enter here and on Schedule 3 (Form 1040), line 1; Form 1041, Schedule G, line 2a; or Form 990-T, Part III, line 1a | 35 | |

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.

THE J. PAUL GETTY TRUST

Identifying number
 95-1790021

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 | 222,990. |
| 2 | Passive activity credits from line 2 of all Parts III with box B checked | 2 | |
| 3 | Enter the applicable passive activity credits allowed for 2020. See instructions | 3 | |
| 4 | Carryforward of general business credit to 2020. Enter the amount from line 2 of Part III with box C checked. See instructions for statement to attach | 4 | 459,206. |
| | Check this box if the carryforward was changed or revised from the original reported amount | | <input type="checkbox"/> |
| 5 | Carryback of general business credit from 2021. Enter the amount from line 2 of Part III with box D checked | 5 | |
| 6 | Add lines 1, 3, 4, and 5 | 6 | 682,196. |

Part II Allowable Credit

| | | | |
|-----|--|-----|---------|
| 7 | Regular tax before credits: • Individuals. Enter the sum of the amounts from Form 1040, 1040-SR, or 1040-NR, line 16, and Schedule 2 (Form 1040), line 2 • 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 | 11,155. |
| 8 | Alternative minimum tax: • Individuals. Enter the amount from Form 6251, line 11 • Corporations. Enter -0- • Estates and trusts. Enter the amount from Schedule I (Form 1041), line 54 | 8 | 11,155. |
| 9 | Add lines 7 and 8 | 9 | 22,310. |
| 10a | Foreign tax credit | 10a | |
| b | Certain allowable credits (see instructions) | 10b | |
| c | Add lines 10a and 10b | 10c | |
| 11 | Net income tax. Subtract line 10c from line 9. If zero, skip lines 12 through 15 and enter -0- on line 16 | 11 | 22,310. |
| 12 | Net regular tax. Subtract line 10c from line 7. If zero or less, enter -0- | 12 | 11,155. |
| 13 | Enter 25% (0.25) of the excess, if any, of line 12 over \$25,000. See instructions | 13 | |
| 14 | Tentative minimum tax: • Individuals. Enter the amount from Form 6251, line 9 • Corporations. Enter -0- • Estates and trusts. Enter the amount from Schedule I (Form 1041), line 52 | 14 | 11,155. |
| 15 | Enter the greater of line 13 or line 14 | 15 | 11,155. |
| 16 | Subtract line 15 from line 11. If zero or less, enter -0- | 16 | 11,155. |
| 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 | 11,155. |

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 3800 (2020)

Part II Allowable Credit (continued)

Note: If you are not required to report any amounts on line 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 2020. 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 | 22,310. |
| 28 | Add lines 17 and 26 | 28 | 11,155. |
| 29 | Subtract line 28 from line 27. If zero or less, enter -0- | 29 | 11,155. |
| 30 | Enter the general business credit from line 5 of all Parts III with box A checked | 30 | 98,445. |
| 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 2020. See instructions | 33 | |
| 34 | Carryforward of business credit to 2020. 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 | 288,271. |
| | Check this box if the carryforward was changed or revised from the original reported amount | | <input type="checkbox"/> |
| 35 | Carryback of business credit from 2021. 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 | 386,716. |
| 37 | Enter the smaller of line 29 or line 36 | 37 | 11,155. |
| 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. Schedule 3 (Form 1040), line 6 • Corporations. Form 1120, Schedule J, Part I, line 5c • Estates and trusts. Form 1041, Schedule G, line 2b | 38 | 22,310. |

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|--|-----------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 150,037. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | 72,953. |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 222,990. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 91,922. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | 6,356. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | 167. |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 98,445. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 321,435. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c 46-3569764 | 4,323. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h 83-3780853 | 61,838. |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 66,161. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c 45-3787006 | 80,397. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f 20-5786733 | 133. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j 33-1192743 | 167. |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 80,697. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 146,858. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 83-0916881 8,363. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | 46-5408240 11,115. |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 19,478. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 33-1192743 283. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | 98-0546998 6,155. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 6,438. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 25,916. |

* See instructions for limitation on this credit.

Name(s) shown on return

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c 35-2575869 | 3,133. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 3,133. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c 98-0546998 | 2,850. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f 26-3948344 | 31. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 2,881. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 6,014. |

* See instructions for limitation on this credit.

Name(s) shown on return

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c 77-0692885 | 3,174. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 3,174. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c 20-5844271 | 32. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f 81-0835161 | 37. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 69. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 3,243. |

* See instructions for limitation on this credit.

Name(s) shown on return

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 80-0965931 1,296. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 1,296. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 82-2883287 2,443. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 2,443. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 3,739. |

* See instructions for limitation on this credit.

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 33-1192743 103. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 103. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 82-1497343 1,991. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 1,991. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 2,094. |

* See instructions for limitation on this credit.

Name(s) shown on return

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 47-2732735 7,444. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 7,444. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 20-3924596 37. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 37. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 7,481. |

* See instructions for limitation on this credit.

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THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 98-0546998 1,016. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 1,016. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 37-1875850 333. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 333. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 1,349. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

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

Table with 3 columns: (a) Description of credit, (b) Enter EIN if claiming the credit from a pass-through entity, (c) Enter the appropriate amount. Rows include 1a-1zz, 2, 3, 4a-4z, 5, 6.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 26-3310007 185. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 185. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 33-1192743 2. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 2. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 187. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 45-4110691 43. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 43. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 47-3010122 407. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 407. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 450. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 47-1245315 3,034. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 3,034. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 98-0546998 30. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 30. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 3,064. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 61-1695851 110,018. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 110,018. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 47-2732735 1. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 1. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 110,019. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 26-1819245 294. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 294. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 80-0860738 125. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 125. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 419. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 81-1863836 |
| d Low-income housing (Form 8586, Part I only) | 1d | 4,834. |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 4,834. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 98-0500169 |
| d Low-income housing (Form 8586, Part II) | 4d | 2,975. |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 2,975. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 7,809. |

* See instructions for limitation on this credit.

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c 98-0613069 | 217. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 217. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c 98-1242771 | 3. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 3. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 220. |

* See instructions for limitation on this credit.

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|---|--------------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | | |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c 37-1875850 | 184. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 184. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c 98-1350547 | 12. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 12. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 196. |

* See instructions for limitation on this credit.

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

Complete a separate Part III for each box checked below. See instructions.

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

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

Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity.

| (a) Description of credit | (b) Enter EIN if claiming the credit from a pass-through entity. | (c) Enter the appropriate amount. |
|---|--|-----------------------------------|
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 82-1928309 2,372. |
| d Low-income housing (Form 8586, Part I only) | 1d | |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 2,372. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 2,372. |

* See instructions for limitation on this credit.

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

Complete a separate Part III for each box checked below. See instructions.

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

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

| (a) Description of credit | (b) | (c) |
|--|--|-------------------------------|
| Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity. | Enter EIN if claiming the credit from a pass-through entity. | Enter the appropriate amount. |
| 1a Investment (Form 3468, Part II only) (attach Form 3468) | 1a | |
| b Reserved | 1b | |
| c Increasing research activities (Form 6765) | 1c | 273,466. |
| d Low-income housing (Form 8586, Part I only) | 1d | 2. |
| e Disabled access (Form 8826)* | 1e | |
| f Renewable electricity, refined coal, and Indian coal production (Form 8835) | 1f | 185,738. |
| g Indian employment (Form 8845) | 1g | |
| h Orphan drug (Form 8820) | 1h | |
| i New markets (Form 8874) | 1i | |
| j Small employer pension plan startup costs and auto-enrollment (Form 8881) | 1j | |
| k Employer-provided child care facilities and services (Form 8882)* | 1k | |
| l Biodiesel and renewable diesel fuels (attach Form 8864) | 1l | |
| m Low sulfur diesel fuel production (Form 8896) | 1m | |
| n Distilled spirits (Form 8906) | 1n | |
| o Nonconventional source fuel (carryforward only) | 1o | |
| p Energy efficient home (Form 8908) | 1p | |
| q Energy efficient appliance (carryforward only) | 1q | |
| r Alternative motor vehicle (Form 8910) | 1r | |
| s Alternative fuel vehicle refueling property (Form 8911) | 1s | |
| t Enhanced oil recovery credit (carryforward only) | 1t | |
| u Mine rescue team training (Form 8923) | 1u | |
| v Agricultural chemicals security (carryforward only) | 1v | |
| w Employer differential wage payments (Form 8932) | 1w | |
| x Carbon oxide sequestration (Form 8933) | 1x | |
| y Qualified plug-in electric drive motor vehicle (Form 8936) | 1y | |
| z Qualified plug-in electric vehicle (carryforward only) | 1z | |
| aa Employee retention (Form 5884-A) | 1aa | |
| bb General credits from an electing large partnership (carryforward only) | 1bb | |
| zz Other. Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions) | 1zz | |
| 2 Add lines 1a through 1zz and enter here and on the applicable line of Part I | 2 | 459,206. |
| 3 Enter the amount from Form 8844 here and on the applicable line of Part II | 3 | |
| 4a Investment (Form 3468, Part III) (attach Form 3468) | 4a | |
| b Work opportunity (Form 5884) | 4b | |
| c Biofuel producer (Form 6478) | 4c | 47,339. |
| d Low-income housing (Form 8586, Part II) | 4d | |
| e Renewable electricity, refined coal, and Indian coal production (Form 8835) | 4e | |
| f Employer social security and Medicare taxes paid on certain employee tips (Form 8846) | 4f | 240,932. |
| g Qualified railroad track maintenance (Form 8900) | 4g | |
| h Small employer health insurance premiums (Form 8941) | 4h | |
| i Increasing research activities (Form 6765) | 4i | |
| j Employer credit for paid family and medical leave (Form 8994) | 4j | |
| z Other | 4z | |
| 5 Add lines 4a through 4z and enter here and on the applicable line of Part II | 5 | 288,271. |
| 6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II | 6 | 747,477. |

* See instructions for limitation on this credit.

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SCHEDULE E INCOME OR (LOSS) FROM PARTNERSHIPS AND S CORPS STATEMENT 25

| NAME | | | | | | | | |
|------------|----------------|----------------------|--------------------------|-----------------|-------------------|--------------------|-----------------------|----------------------|
| EMP ID NO. | | | | | | | | |
| CODE | X IF FRN | BASIS COMP REQ | ANY NOT AT RISK | PASSIVE LOSS | PASSIVE INCOME | NONPASSIVE LOSS | SEC. 179 DEDUCTION | NONPASSIVE INCOME |
| G1 | | | | | | | | |
| P E1 | | | | | | | | 167,973. |
| P G2 | | | | | | 224,594. | | |
| P E2 | | | | | | | | 534,664. |
| P A83 | | | | | | | | 55,042. |
| P A8A | | | | | | 19,269. | | |
| P A8B | | | | | | 22,524. | | |
| P A9 | | | | | | 177,022. | | |
| P F10A | | | | | | | | 12,692. |
| P E6 | | | | | | 4,975. | | |
| P G3 | | | | | | | | 321,559. |
| P G4 | | | | | | 71,100. | | |
| P E9 | | | | | | 2,499. | | |
| P A7 | | | | | | 1,392,762. | | |
| P A19 | | | | | | 687. | | |
| P | | | | | | 1,538,414. | | |

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| | | |
|------|----------|------------|
| A20 | | |
| P | 473,937. | |
| C5 | | |
| P | | 31,353. |
| A21 | | |
| P | 310. | |
| A25 | | |
| P | 458. | |
| A32 | | |
| P | 527,574. | |
| D3 | | |
| P | 114,938. | |
| E14 | | |
| P | | 577,695. |
| E15 | | |
| P | | 28,042. |
| E13 | | |
| P | | 125,976. |
| E16 | | |
| P | | 1,203,647. |
| E19 | | |
| P | | 617,701. |
| E13A | | |
| P | | 338,708. |
| E13B | | |
| P | | 13,121. |
| A35 | | |
| P | 45,414. | |
| E22 | | |
| P | 18,017. | |
| A36 | | |
| P | 581,193. | |
| E23 | | |
| P | 0. | |
| E27 | | |
| P | | 86,049. |
| E28 | | |
| P | 132,576. | |
| E30 | | |
| P | 1,507. | |

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| | | | |
|------|---|----------|------------|
| E31 | | | |
| P | | 29,331. | |
| A41 | | | |
| P | | 134,015. | |
| E33 | | | |
| P | | | 507,333. |
| F20 | | | |
| P | | 47. | |
| F21 | | | |
| P | | 50. | |
| E34 | | | |
| P | * | 50,464. | |
| G6 | | | |
| P | | 0. | |
| A47 | | | |
| P | | 174. | |
| A48 | | | |
| P | | | 303,954. |
| E41 | | | |
| P | * | 26,132. | |
| E44 | | | |
| P | | | 75,090. |
| E45 | | | |
| P | | | 120,327. |
| A50 | | | |
| P | | 135,559. | |
| E47 | | | |
| P | | | 334,603. |
| E48A | | | |
| P | | 198,805. | |
| E48 | | | |
| P | | | 213,522. |
| E52 | | | |
| P | | | 1,585,240. |
| G7 | | | |
| P | | 189,081. | |
| E54 | | | |
| P | | 556,325. | |
| E55 | | | |
| P | | 85,239. | |

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| | | | |
|------|---|------------|------------|
| E56 | | | |
| P | | 133,215. | |
| E59 | | | |
| P | | | 3,484,295. |
| E58 | | | |
| P | | | 340,603. |
| E57 | | | |
| P | | | 77,292. |
| E60A | | | |
| P | | 1,802,492. | |
| A52A | | | |
| P | | 199,761. | |
| A52 | | | |
| P | | 135,971. | |
| E65 | | | |
| P | | 0. | |
| E67 | | | |
| P | | 0. | |
| E68 | | | |
| P | | 0. | |
| G9 | | | |
| P | | 0. | |
| E62 | | | |
| P | | | 44,513. |
| A55 | | | |
| P | | 44,975. | |
| A56 | | | |
| P | | 142,016. | |
| E71 | | | |
| P | | 97,581. | |
| B15 | | | |
| P | | | 1,959. |
| E72 | | | |
| P | | 0. | |
| G10 | | | |
| P | * | 93,001. | |
| A91 | | | |
| P | | 60,681. | |
| A57 | | | |
| P | | | 162,441. |

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| | | |
|------|------------|----------|
| A59 | | |
| P | | 82,897. |
| A60 | | |
| P | 17,569. | |
| A61 | | |
| P | 2,480. | |
| E77 | | |
| P | | 702,337. |
| E78A | | |
| P | | 464,947. |
| E78B | | |
| P | 2,756. | |
| G11 | | |
| P | 19,188. | |
| G12 | | |
| P | 9,872. | |
| E79 | | |
| P | 41,270. | |
| A65 | | |
| P | 27,523. | |
| G13 | | |
| P | | 135,631. |
| E84 | | |
| P | 116,057. | |
| E85 | | |
| P | | 302,773. |
| E89 | | |
| P | | 16,257. |
| E90 | | |
| P | 100,560. | |
| E92 | | |
| P | 1,625,866. | |
| E93 | | |
| P | 818. | |
| E94 | | |
| P | | 857,614. |
| E96 | | |
| P | 435,236. | |
| E97 | | |
| P | 196,383. | |

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| | | |
|------|----------|----------|
| E107 | | |
| P | | 191,503. |
| E108 | | |
| P | 279,198. | |
| E110 | | |
| P | 35,798. | |
| E109 | | |
| P | | 71,009. |
| A81 | | |
| P | | 339,097. |
| E113 | | |
| P | 32,932. | |
| G15 | | |
| P | 7,989. | |
| G16 | | |
| P | 11,217. | |
| E116 | | |
| P | 0. | |
| E117 | | |
| P | 56,572. | |
| E118 | | |
| P | 152,992. | |
| E119 | | |
| P | 88,026. | |
| E120 | | |
| P | 748,463. | |
| E121 | | |
| P | 239,672. | |
| C26 | | |
| P | 122,913. | |
| C27 | | |
| P | | 9,518. |
| F73 | | |
| P | 156,048. | |
| F74 | | |
| P | 2,206. | |
| A86 | | |
| P | 632,544. | |
| A88 | | |
| P | 665,752. | |

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| | | |
|------|----|------------|
| A87 | | |
| P | | 11,481. |
| G17 | | |
| P | | 311. |
| A90 | | |
| P | | 16. |
| E127 | | |
| P | 0. | |
| F79 | | |
| P | | 868. |
| E128 | | |
| P | | 10,382. |
| E129 | | |
| P | | 600,533. |
| E130 | | |
| P | | 390,262. |
| E131 | | |
| P | | 313,052. |
| E132 | | |
| P | | 336,211. |
| E133 | | |
| P | | 46,048. |
| E134 | | |
| P | | 309,977. |
| E135 | | |
| P | | 367,772. |
| E136 | | |
| P | | 1,139,881. |
| F82 | | |
| P | | 0. |
| C32A | | |
| P | | 58,780. |
| C32B | | |
| P | | 0. |
| C32 | | |
| P | | 140,655. |
| G21 | | |
| P | | 21,716. |
| E146 | | |
| P | | 1,493,013. |

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|------|----|------------|----------|
| E147 | | | |
| P | | 897,372. | |
| A95 | | | |
| P | | 650,745. | |
| E148 | | | |
| P | | 139,207. | |
| E149 | | | |
| P | | 836,620. | |
| E150 | | | |
| P | 0. | | |
| E152 | | | |
| P | 0. | | |
| A96 | | | |
| P | | | 9,126. |
| E39 | | | |
| P | | 756. | |
| E156 | | | |
| P | | | 534,331. |
| E158 | | | |
| P | | | 26,942. |
| E159 | | | |
| P | | 60,621. | |
| E160 | | | |
| P | | 363,288. | |
| E161 | | | |
| P | | 1,140,212. | |
| E162 | | | |
| P | | 399,332. | |
| C49 | | | |
| P | | 303,237. | |
| E145 | | | |
| P | | | 129,361. |
| A99 | | | |
| P | | 1,478. | |
| F106 | | | |
| P | | 15,117. | |
| F118 | | | |
| P | | 0. | |
| E164 | | | |
| P | 0. | | |

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| | | | |
|-------|---|----------|----------|
| E169 | | | |
| P | | | 122,447. |
| E166 | | | |
| P | | 118,246. | |
| E165 | | | |
| P | | | 8,149. |
| E167 | | | |
| P | | 464,484. | |
| E168 | | | |
| P | | 292,749. | |
| A102 | | | |
| P | | | 162,374. |
| C57 | | | |
| P | | 225,466. | |
| C58 | | | |
| P | | 567,647. | |
| E171 | | | |
| P | | 88,040. | |
| E170 | | | |
| P | | 158,903. | |
| G22 | | | |
| P | | 0. | |
| G23 | | | |
| P | | | 1,955. |
| A103 | | | |
| P | | | 4,176. |
| A106 | | | |
| P | | | 281. |
| E175A | | | |
| P | * | 735,737. | |
| A113A | | | |
| P | | | 486,044. |
| G24 | | | |
| P | * | 26,238. | |
| E50 | | | |
| P | | 105,897. | |
| E61 | | | |
| P | | 398,562. | |
| E51 | | | |
| P | | | 71,505. |

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| | | |
|-------|----------|----------|
| E53 | | |
| P | | 940,361. |
| C64 | | |
| P | | 57. |
| C66 | | |
| P | 15,220. | |
| C67 | | |
| P | 14,365. | |
| D32 | | |
| P | 774,601. | |
| A111 | | |
| P | | 87,824. |
| A112 | | |
| P | | 23,547. |
| A113B | | |
| P | 632. | |
| A113C | | |
| P | 0. | |
| A113D | | |
| P | 2,319. | |
| A113E | | |
| P | | 123,190. |
| A113F | | |
| P | 4,535. | |
| A114A | | |
| P | 47,498. | |
| A114B | | |
| P | 2,137. | |
| A114C | | |
| P | | 126,106. |
| A114D | | |
| P | 8,691. | |
| A114E | | |
| P | | 33,164. |
| A115A | | |
| P | 242. | |
| A115B | | |
| P | 60. | |
| A115C | | |
| P | | 1,193. |

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| | | |
|-------|----|------------|
| A115D | | |
| P | | 55,603. |
| A115E | | |
| P | | 26,566. |
| E181 | | |
| P | | 178,055. |
| E182 | | |
| P | | 252,573. |
| E183 | | |
| P | 0. | |
| A121 | | |
| P | | 260,496. |
| E184 | | |
| P | | 69,540. |
| E185 | | |
| P | | 978,915. |
| E186 | | |
| P | | 494,427. |
| E188 | | |
| P | | 20,738. |
| C69 | | |
| P | | 1,506,184. |
| A120A | | |
| P | | 133,221. |
| A120B | | |
| P | | 34,660. |
| A120C | | |
| P | | 36,609. |
| A120D | | |
| P | | 324,266. |
| A120E | | |
| P | | 62,104. |
| A120F | | |
| P | | 19,228. |
| A120G | | |
| P | | 28,397. |
| A120H | | |
| P | | 704,679. |
| A107A | | |
| P | | 30,802. |

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G25

P * 24,343.
A43

P 540,753.
A42

P 659,813.
SCHEDULE E, PAGE 2 - PTP ALLOWED LOSSES

P 955,915.

| | | | |
|--------------------------|-----------------|--------------------|--------------------|
| TOTALS TO SCH. E, LN. 29 | <u>955,915.</u> | <u>33,807,135.</u> | <u>19,459,744.</u> |
|--------------------------|-----------------|--------------------|--------------------|

THE J. PAUL GETTY TRUST

95-1790021

SCHEDULE I NET OPERATING LOSS CARRYOVER STATEMENT 26

| TAX YEAR | LOSS SUSTAINED | LOSS PREVIOUSLY APPLIED | AMOUNT |
|-----------------------------|----------------|-------------------------|-------------|
| 06/30/09 | 20,176,232. | 2,615,033. | 17,561,199. |
| 06/30/10 | 12,117,799. | 0. | 12,117,799. |
| 06/30/11 | 8,894,181. | 0. | 8,894,181. |
| 06/30/14 | 3,126,844. | 0. | 3,126,844. |
| 06/30/16 | 5,187,755. | 0. | 5,187,755. |
| 06/30/18 | 2,407,083. | 0. | 2,407,083. |
| TOTAL TO SCHEDULE I, LINE 6 | | | 49,294,861. |

FORM 1116 EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME STATEMENT 27

| DESCRIPTION | COUNTRY | AMOUNT |
|--|-----------------|-------------|
| SPECIFICALLY FOREIGN ITEMIZED DEDUCTIONS | OTHER COUNTRIES | 3,737,919. |
| OTHER EXPENSES DIRECTLY ALLOCATED | OTHER COUNTRIES | 9,499,196. |
| TOTAL TO FORM 1116, LINE 2 | | 13,237,115. |

FORM 1116 FOREIGN TAX CREDIT CARRYOVER / CARRYBACK STATEMENT 28

PASSIVE

| DESCRIPTION | AMOUNT | |
|---------------------------------------|------------|-------------|
| 2019 FOREIGN TAX CREDIT | 4,710,954. | |
| 2018 FOREIGN TAX CREDIT | 7,184,122. | |
| 2017 FOREIGN TAX CREDIT | 3,117,649. | |
| 2016 FOREIGN TAX CREDIT | 3,704,597. | |
| 2015 FOREIGN TAX CREDIT | 4,027,068. | |
| 2014 FOREIGN TAX CREDIT | 3,183,076. | |
| 2013 FOREIGN TAX CREDIT | 2,149,675. | |
| 2012 FOREIGN TAX CREDIT | 2,005,387. | |
| 2011 FOREIGN TAX CREDIT | 1,154,479. | |
| TOTAL TO FORM 1116, PART III, LINE 10 | | 31,237,007. |

THE J. PAUL GETTY TRUST

95-1790021

FORM 1116 FOREIGN TAX CREDIT CARRYOVER / CARRYBACK STATEMENT 29

GENERAL

| DESCRIPTION | AMOUNT |
|---------------------------------------|------------|
| 2019 FOREIGN TAX CREDIT | 22,784. |
| 2018 FOREIGN TAX CREDIT | 10,569. |
| 2016 FOREIGN TAX CREDIT | 200,836. |
| 2015 FOREIGN TAX CREDIT | 303,047. |
| 2014 FOREIGN TAX CREDIT | 734,136. |
| 2013 FOREIGN TAX CREDIT | 86,406. |
| 2012 FOREIGN TAX CREDIT | 204,502. |
| 2011 FOREIGN TAX CREDIT | 186,634. |
| TOTAL TO FORM 1116, PART III, LINE 10 | 1,748,914. |

FORM 1116AMT EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME STATEMENT 30

| DESCRIPTION | COUNTRY | AMOUNT |
|--|-----------------|-------------|
| SPECIFICALLY FOREIGN ITEMIZED DEDUCTIONS | OTHER COUNTRIES | 3,737,919. |
| OTHER EXPENSES DIRECTLY ALLOCATED | OTHER COUNTRIES | 9,499,196. |
| TOTAL TO FORM 1116AMT, LINE 2 | | 13,237,115. |

FORM 1116 FOREIGN TAX CREDIT CARRYOVER / CARRYBACK STATEMENT 31

PASSIVE

| DESCRIPTION | AMOUNT |
|---|-------------|
| 2019 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 4,710,954. |
| 2018 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 7,184,122. |
| 2017 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 3,117,649. |
| 2016 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 3,704,597. |
| 2015 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 4,027,068. |
| 2014 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 3,183,076. |
| 2013 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 2,149,675. |
| 2012 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 2,005,387. |
| 2011 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 1,154,479. |
| TOTAL TO FORM 1116, PART III, LINE 10 | 31,237,007. |

THE J. PAUL GETTY TRUST

95-1790021

FORM 1116

FOREIGN TAX CREDIT CARRYOVER / CARRYBACK

STATEMENT 32

GENERAL

| DESCRIPTION | AMOUNT |
|---|-----------------------|
| 2019 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 22,784. |
| 2018 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 10,569. |
| 2016 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 200,836. |
| 2015 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 303,047. |
| 2014 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 734,136. |
| 2013 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 86,406. |
| 2012 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 204,502. |
| 2011 ALTERNATIVE MINIMUM FOREIGN TAX CREDIT | 186,634. |
| TOTAL TO FORM 1116, PART III, LINE 10 | <u>1,748,914.</u> |

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No. 1545-0092

Department of the Treasury
Internal Revenue Service

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

2020

Name of estate or trust

Employer identification number

THE J. PAUL GETTY TRUST

95-1790021

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|---|----------------------------------|---------------------------------|---|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts SEE STATEMENT 33 | | | | 5 1,105,469. |
| 6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2019 Capital Loss Carryover Worksheet | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2 | | | | 7 1,105,469. |

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|--|----------------------------------|---------------------------------|--|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | | | | |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts SEE STATEMENT 34 | | | | 12 6,579,368. |
| 13 Capital gain distributions | | | | 13 |
| 14 Gain from Form 4797, Part I | | | | 14 1,350,228. |
| 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2019 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2 | | | | 16 7,929,596. |

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

Schedule D (Form 1041) 2020

| Part III Summary of Parts I and II | | (1) Beneficiaries' | (2) Estate's or trust's | (3) Total |
|--|---|--------------------|-------------------------|------------|
| Caution: Read the instructions before completing this part. | | | | |
| 17 | Net short-term gain or (loss) | 17 | 1,105,469. | 1,105,469. |
| 18 | Net long-term gain or (loss): | | | |
| a | Total for year | 18a | 7,929,596. | 7,929,596. |
| b | Unrecaptured section 1250 gain (see line 18 of the worksheet) | 18b | | |
| c | 28% rate gain | 18c | | |
| 19 | Total net gain or (loss). Combine lines 17 and 18a | 19 | 9,035,065. | 9,035,065. |

Note: If line 19, col (3), is a net gain, enter the gain on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4a). If lines 18a and 19, col (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

Part IV Capital Loss Limitation

| | | | |
|----|--|----|-----|
| 20 | Enter here and enter as a (loss) on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4c, if a trust), the smaller of: | | |
| a | The loss on line 19, column (3) or b \$3,000 | 20 | () |

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, Part I, line 11), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero.

Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, Part I, line 11, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

| | | | | |
|----|--|----|--|--|
| 21 | Enter taxable income from Form 1041, line 23 (or Form 990-T, Part I, line 11) | 21 | | |
| 22 | Enter the smaller of line 18a or 19 in column (2) but not less than zero | 22 | | |
| 23 | Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) | 23 | | |
| 24 | Add lines 22 and 23 | 24 | | |
| 25 | If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- | 25 | | |
| 26 | Subtract line 25 from line 24. If zero or less, enter -0- | 26 | | |
| 27 | Subtract line 26 from line 21. If zero or less, enter -0- | 27 | | |
| 28 | Enter the smaller of the amount on line 21 or \$2,650 | 28 | | |
| 29 | Enter the smaller of the amount on line 27 or line 28 | 29 | | |
| 30 | Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% | 30 | | |
| 31 | Enter the smaller of line 21 or line 26 | 31 | | |
| 32 | Subtract line 30 from line 26 | 32 | | |
| 33 | Enter the smaller of line 21 or \$13,150 | 33 | | |
| 34 | Add lines 27 and 30 | 34 | | |
| 35 | Subtract line 34 from line 33. If zero or less, enter -0- | 35 | | |
| 36 | Enter the smaller of line 32 or line 35 | 36 | | |
| 37 | Multiply line 36 by 15% (0.15) | 37 | | |
| 38 | Enter the amount from line 31 | 38 | | |
| 39 | Add lines 30 and 36 | 39 | | |
| 40 | Subtract line 39 from line 38. If zero or less, enter -0- | 40 | | |
| 41 | Multiply line 40 by 20% (0.20) | 41 | | |
| 42 | Figure the tax on the amount on line 27. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 42 | | |
| 43 | Add lines 37, 41, and 42 | 43 | | |
| 44 | Figure the tax on the amount on line 21. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 44 | | |
| 45 | Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, Part II, line 2) | 45 | | |

**SCHEDULE D
(Form 1041)**

**ALTERNATIVE MINIMUM TAX
Capital Gains and Losses**

OMB No. 1545-0092

2020

Department of the Treasury
Internal Revenue Service

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

Name of estate or trust

Employer identification number

THE J. PAUL GETTY TRUST

95-1790021

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|---|----------------------------------|---------------------------------|---|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 5 1,105,469. |
| 6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2019 Capital Loss Carryover Worksheet | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2 | | | | 7 1,105,469. |

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|--|----------------------------------|---------------------------------|--|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | | | | |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 12 6,579,368. |
| 13 Capital gain distributions | | | | 13 |
| 14 Gain from Form 4797, Part I | | | | 14 1,327,819. |
| 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2019 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2 | | | | 16 7,907,187. |

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

Schedule D (Form 1041) 2020

ALTERNATIVE MINIMUM TAX

Schedule D (Form 1041) 2020 QUALIFYING PARTNERSHIP INVESTMENTS

95-1790021

Page 2

Table with 4 columns: (1) Beneficiaries', (2) Estate's or trust's, (3) Total. Rows include: 17 Net short-term gain or (loss), 18 Net long-term gain or (loss) (a, b, c), 19 Total net gain or (loss).

Note: If line 19, col (3), is a net gain, enter the gain on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4a). If lines 18a and 19, col (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

Part IV Capital Loss Limitation

Table with 2 columns: (1) Beneficiaries', (2) Estate's or trust's. Row 20: Enter here and enter as a (loss) on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4c, if a trust), the smaller of: a The loss on line 19, column (3) or b \$3,000.

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, Part I, line 11), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero.

Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
• Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, Part I, line 11, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

Table with 4 columns: (1) Beneficiaries', (2) Estate's or trust's, (3) Total. Rows include: 21 Enter taxable income from Form 1041, line 23 (or Form 990-T, Part I, line 11), 22 Enter the smaller of line 18a or 19 in column (2) but not less than zero, 23 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T), 24 Add lines 22 and 23, 25 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-, 26 Subtract line 25 from line 24. If zero or less, enter -0-, 27 Subtract line 26 from line 21. If zero or less, enter -0-, 28 Enter the smaller of the amount on line 21 or \$2,650, 29 Enter the smaller of the amount on line 27 or line 28, 30 Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0%, 31 Enter the smaller of line 21 or line 26, 32 Subtract line 30 from line 26, 33 Enter the smaller of line 21 or \$13,150, 34 Add lines 27 and 30, 35 Subtract line 34 from line 33. If zero or less, enter -0-, 36 Enter the smaller of line 32 or line 35, 37 Multiply line 36 by 15% (0.15), 38 Enter the amount from line 31, 39 Add lines 30 and 36, 40 Subtract line 39 from line 38. If zero or less, enter -0-, 41 Multiply line 40 by 20% (0.20), 42 Figure the tax on the amount on line 27. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041), 43 Add lines 37, 41, and 42, 44 Figure the tax on the amount on line 21. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041), 45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, Part II, line 2).

**SCHEDULE D
(Form 1041)**

**ALTERNATIVE MINIMUM TAX
Capital Gains and Losses**

OMB No. 1545-0092

Department of the Treasury
Internal Revenue Service

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

2020

Name of estate or trust

Employer identification number

THE J. PAUL GETTY TRUST

95-1790021

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|---|----------------------------------|---------------------------------|---|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 5 |
| 6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2019 Capital Loss Carryover Worksheet | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2 | | | | 7 |

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|--|----------------------------------|---------------------------------|--|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | | | | |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 12 |
| 13 Capital gain distributions | | | | 13 |
| 14 Gain from Form 4797, Part I | | | | 14 22,409. |
| 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2019 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2 | | | | 16 22,409. |

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

Schedule D (Form 1041) 2020

ALTERNATIVE MINIMUM TAX

Schedule D (Form 1041) 2020 E2 PARTNERSHIP INVESTMENT

95-1790021

Page 2

Table with 4 columns: (1) Beneficiaries', (2) Estate's or trust's, (3) Total. Rows include: 17 Net short-term gain or (loss), 18 Net long-term gain or (loss) (a, b, c), 19 Total net gain or (loss).

Note: If line 19, col (3), is a net gain, enter the gain on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4a). If lines 18a and 19, col (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

Part IV Capital Loss Limitation

Table with 2 columns: (1) Beneficiaries', (2) Estate's or trust's. Row 20: Enter here and enter as a (loss) on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4c, if a trust), the smaller of: a The loss on line 19, column (3) or b \$3,000.

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, Part I, line 11), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero.

Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
• Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, Part I, line 11, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

Table with 4 columns: (1) Beneficiaries', (2) Estate's or trust's, (3) Total. Rows include: 21 Enter taxable income from Form 1041, line 23 (or Form 990-T, Part I, line 11), 22 Enter the smaller of line 18a or 19 in column (2) but not less than zero, 23 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T), 24 Add lines 22 and 23, 25 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-, 26 Subtract line 25 from line 24. If zero or less, enter -0-, 27 Subtract line 26 from line 21. If zero or less, enter -0-, 28 Enter the smaller of the amount on line 21 or \$2,650, 29 Enter the smaller of the amount on line 27 or line 28, 30 Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0%, 31 Enter the smaller of line 21 or line 26, 32 Subtract line 30 from line 26, 33 Enter the smaller of line 21 or \$13,150, 34 Add lines 27 and 30, 35 Subtract line 34 from line 33. If zero or less, enter -0-, 36 Enter the smaller of line 32 or line 35, 37 Multiply line 36 by 15% (0.15), 38 Enter the amount from line 31, 39 Add lines 30 and 36, 40 Subtract line 39 from line 38. If zero or less, enter -0-, 41 Multiply line 40 by 20% (0.20), 42 Figure the tax on the amount on line 27. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041), 43 Add lines 37, 41, and 42, 44 Figure the tax on the amount on line 21. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041), 45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, Part II, line 2).

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No. 1545-0092

Department of the Treasury
Internal Revenue Service

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

2020

Name of estate or trust

Employer identification number

THE J. PAUL GETTY TRUST

95-1790021

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|---|----------------------------------|---------------------------------|---|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts SEE STATEMENT 35 | | | | 5 1,105,469. |
| 6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2019 Capital Loss Carryover Worksheet | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2 | | | | 7 1,105,469. |

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|--|----------------------------------|---------------------------------|--|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | | | | |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts SEE STATEMENT 36 | | | | 12 6,579,368. |
| 13 Capital gain distributions | | | | 13 |
| 14 Gain from Form 4797, Part I | | | | 14 1,327,819. |
| 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2019 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2 | | | | 16 7,907,187. |

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

Schedule D (Form 1041) 2020

| Part III Summary of Parts I and II | | (1) Beneficiaries' | (2) Estate's or trust's | (3) Total |
|--|---|--------------------|-------------------------|------------|
| <i>Caution: Read the instructions before completing this part.</i> | | | | |
| 17 | Net short-term gain or (loss) | 17 | 1,105,469. | 1,105,469. |
| 18 | Net long-term gain or (loss): | | | |
| a | Total for year | 18a | 7,907,187. | 7,907,187. |
| b | Unrecaptured section 1250 gain (see line 18 of the worksheet) | 18b | | |
| c | 28% rate gain | 18c | | |
| 19 | Total net gain or (loss). Combine lines 17 and 18a | 19 | 9,012,656. | 9,012,656. |

Note: If line 19, col (3), is a net gain, enter the gain on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4a). If lines 18a and 19, col (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

| Part IV Capital Loss Limitation | | |
|--|---|--------|
| 20 | Enter here and enter as a (loss) on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4c, if a trust), the smaller of: a The loss on line 19, column (3) or b \$3,000 | 20 () |

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, Part I, line 11), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates
Form 1041 filers. Complete this part **only** if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, Part I, line 11, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

| | | | | |
|----|--|----|--|--|
| 21 | Enter taxable income from Form 1041, line 23 (or Form 990-T, Part I, line 11) | 21 | | |
| 22 | Enter the smaller of line 18a or 19 in column (2) but not less than zero | 22 | | |
| 23 | Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) | 23 | | |
| 24 | Add lines 22 and 23 | 24 | | |
| 25 | If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- | 25 | | |
| 26 | Subtract line 25 from line 24. If zero or less, enter -0- | 26 | | |
| 27 | Subtract line 26 from line 21. If zero or less, enter -0- | 27 | | |
| 28 | Enter the smaller of the amount on line 21 or \$2,650 | 28 | | |
| 29 | Enter the smaller of the amount on line 27 or line 28 | 29 | | |
| 30 | Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% | 30 | | |
| 31 | Enter the smaller of line 21 or line 26 | 31 | | |
| 32 | Subtract line 30 from line 26 | 32 | | |
| 33 | Enter the smaller of line 21 or \$13,150 | 33 | | |
| 34 | Add lines 27 and 30 | 34 | | |
| 35 | Subtract line 34 from line 33. If zero or less, enter -0- | 35 | | |
| 36 | Enter the smaller of line 32 or line 35 | 36 | | |
| 37 | Multiply line 36 by 15% (0.15) | 37 | | |
| 38 | Enter the amount from line 31 | 38 | | |
| 39 | Add lines 30 and 36 | 39 | | |
| 40 | Subtract line 39 from line 38. If zero or less, enter -0- | 40 | | |
| 41 | Multiply line 40 by 20% (0.20) | 41 | | |
| 42 | Figure the tax on the amount on line 27. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 42 | | |
| 43 | Add lines 37, 41, and 42 | 43 | | |
| 44 | Figure the tax on the amount on line 21. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 44 | | |
| 45 | Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, Part II, line 2) | 45 | | |

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No. 1545-0092

Department of the Treasury
Internal Revenue Service

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

2020

Name of estate or trust

Employer identification number

THE J. PAUL GETTY TRUST

95-1790021

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

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

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|---|----------------------------------|---------------------------------|---|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b | | | | |
| 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked | | | | |
| 2 Totals for all transactions reported on Form(s) 8949 with Box B checked | | | | |
| 3 Totals for all transactions reported on Form(s) 8949 with Box C checked | | | | |
| 4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 | | | | 4 |
| 5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 5 |
| 6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2019 Capital Loss Carryover Worksheet | | | | 6 () |
| 7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2 | | | | 7 |

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.

| | (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) |
|--|----------------------------------|---------------------------------|--|---|
| This form may be easier to complete if you round off cents to whole dollars. | | | | |
| 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b | | | | |
| 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked | | | | |
| 9 Totals for all transactions reported on Form(s) 8949 with Box E checked | | | | |
| 10 Totals for all transactions reported on Form(s) 8949 with Box F checked | | | | |
| 11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 | | | | 11 |
| 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts | | | | 12 |
| 13 Capital gain distributions | | | | 13 |
| 14 Gain from Form 4797, Part I | | | | 14 22,409. |
| 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2019 Capital Loss Carryover Worksheet | | | | 15 () |
| 16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2 | | | | 16 22,409. |

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

Schedule D (Form 1041) 2020

| Part III Summary of Parts I and II | | (1) Beneficiaries' | (2) Estate's or trust's | (3) Total |
|--|---|--------------------|-------------------------|-----------|
| Caution: Read the instructions before completing this part. | | | | |
| 17 | Net short-term gain or (loss) | 17 | | |
| 18 | Net long-term gain or (loss): | | | |
| a | Total for year | 18a | 22,409. | 22,409. |
| b | Unrecaptured section 1250 gain (see line 18 of the worksheet) | 18b | | |
| c | 28% rate gain | 18c | | |
| 19 | Total net gain or (loss). Combine lines 17 and 18a | 19 | 22,409. | 22,409. |

Note: If line 19, col (3), is a net gain, enter the gain on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4a). If lines 18a and 19, col (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

| Part IV Capital Loss Limitation | | |
|--|--|--------|
| 20 | Enter here and enter as a (loss) on Form 1041, line 4 (or Schedule A (Form 990-T), Part I, line 4c, if a trust), the smaller of: | |
| a | The loss on line 19, column (3) or b \$3,000 | 20 () |

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, Part I, line 11), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

| Part V Tax Computation Using Maximum Capital Gains Rates | |
|--|--|
| Form 1041 filers. Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero. | |

Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, Part I, line 11, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

| | | | | |
|----|--|----|--|--|
| 21 | Enter taxable income from Form 1041, line 23 (or Form 990-T, Part I, line 11) | 21 | | |
| 22 | Enter the smaller of line 18a or 19 in column (2) but not less than zero | 22 | | |
| 23 | Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) | 23 | | |
| 24 | Add lines 22 and 23 | 24 | | |
| 25 | If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- | 25 | | |
| 26 | Subtract line 25 from line 24. If zero or less, enter -0- | 26 | | |
| 27 | Subtract line 26 from line 21. If zero or less, enter -0- | 27 | | |
| 28 | Enter the smaller of the amount on line 21 or \$2,650 | 28 | | |
| 29 | Enter the smaller of the amount on line 27 or line 28 | 29 | | |
| 30 | Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% | 30 | | |
| 31 | Enter the smaller of line 21 or line 26 | 31 | | |
| 32 | Subtract line 30 from line 26 | 32 | | |
| 33 | Enter the smaller of line 21 or \$13,150 | 33 | | |
| 34 | Add lines 27 and 30 | 34 | | |
| 35 | Subtract line 34 from line 33. If zero or less, enter -0- | 35 | | |
| 36 | Enter the smaller of line 32 or line 35 | 36 | | |
| 37 | Multiply line 36 by 15% (0.15) | 37 | | |
| 38 | Enter the amount from line 31 | 38 | | |
| 39 | Add lines 30 and 36 | 39 | | |
| 40 | Subtract line 39 from line 38. If zero or less, enter -0- | 40 | | |
| 41 | Multiply line 40 by 20% (0.20) | 41 | | |
| 42 | Figure the tax on the amount on line 27. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 42 | | |
| 43 | Add lines 37, 41, and 42 | 43 | | |
| 44 | Figure the tax on the amount on line 21. Use the 2020 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) | 44 | | |
| 45 | Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, Part II, line 2) | 45 | | |

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

2020

Attachment
Sequence No. **27**

THE J. PAUL GETTY TRUST

Identifying number
95-1790021

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 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 37 | | | | | | 1,350,228. |

| | | | |
|---|---|----------|-------------------|
| 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 | 7 | 1,350,228. |

Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, 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.

| | | | |
|---|---|----------|-------------------|
| 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 | 1,350,228. |

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):

| | | | | | | | |
|--|-------------------------|--|--|--|--|--|-------------------|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | SEE STATEMENT 38 | | | | | | 1,102,518. |

| | | | |
|----|--|-----------|-------------------|
| 11 | Loss, if any, from line 7 | 11 | () |
| 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 | 1,102,518. |

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 loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions

b Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4

| | |
|------------|--|
| 18a | |
| 18b | |

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

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. | | | | | |
| 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 | |

ALTERNATIVE MINIMUM TAX

Sales of Business Property

(Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2))

Attach to your tax return.

OMB No. 1545-0184

2020

Attachment Sequence No. 27

Form 4797

Department of the Treasury Internal Revenue Service

Name(s) shown on return

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

THE J. PAUL GETTY TRUST

Identifying number

95-1790021

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 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)

Table with 7 columns: (a) Description of property, (b) Date acquired, (c) Date sold, (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)

3 Gain, if any, from Form 4684, line 39
4 Section 1231 gain from installment sales from Form 6252, line 26 or 37
5 Section 1231 gain or (loss) from like-kind exchanges from Form 8824
6 Gain, if any, from line 32, from other than casualty or theft
7 Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows

3
4
5
6
7 1,327,819.

Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, 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.

8 Nonrecaptured net section 1231 losses from prior years. See instructions
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

8
9 1,327,819.

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):

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

11 ()
12
13
14
15
16
17 1,102,518.

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 loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions
b Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4

18a
18b

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

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. | | | |
| 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 | 2,430,337. |
| 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 | | |

ALTERNATIVE MINIMUM TAX

Sales of Business Property

(Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2))

Attach to your tax return.

OMB No. 1545-0184

2020

Attachment Sequence No. 27

Form 4797

Department of the Treasury Internal Revenue Service

Name(s) shown on return

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

THE J. PAUL GETTY TRUST

Identifying number 95-1790021

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 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)

Table with 7 columns: (a) Description of property, (b) Date acquired, (c) Date sold, (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)

- 3 Gain, if any, from Form 4684, line 39
4 Section 1231 gain from installment sales from Form 6252, line 26 or 37
5 Section 1231 gain or (loss) from like-kind exchanges from Form 8824
6 Gain, if any, from line 32, from other than casualty or theft
7 Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows

Summary table for lines 3-7 with values: 3, 4, 5, 6, 7 22,409.

Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, 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.

- 8 Nonrecaptured net section 1231 losses from prior years. See instructions
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

Summary table for lines 8-9 with values: 8, 9 22,409.

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):

Table for line 10 with multiple empty rows for reporting gains and losses.

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

Summary table for lines 11-17 with values: 11 (), 12, 13, 14, 15, 16, 17

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 loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions

b Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Schedule 1 (Form 1040), Part I, line 4

Summary table for line 18 with values: 18a, 18b

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

THE J. PAUL GETTY TRUST

95-1790021

SCHEDULE D

NET LONG-TERM GAIN OR LOSS FROM
PARTNERSHIPS AND S-CORPORATIONS

STATEMENT 34

| DESCRIPTION OF ACTIVITY | GAIN OR LOSS | 28% GAIN |
|---------------------------------------|--------------|----------|
| E1 | 322,868. | |
| G3 | 33,667. | |
| C5 | 45,127. | |
| D3 | 97. | |
| A35 | -3. | |
| E27 | 2,592. | |
| A52 | 1,642,470. | |
| B15 | 863,162. | |
| A57 | -22. | |
| A59 | -49,299. | |
| A60 | 2,993. | |
| A61 | 407,952. | |
| G13 | 60. | |
| E110 | -4,362. | |
| C27 | -727. | |
| A88 | -12,842. | |
| A90 | -78. | |
| E131 | 72. | |
| E132 | 182,586. | |
| E133 | -516. | |
| E134 | -1,470. | |
| E135 | -312. | |
| C32B | -1,147. | |
| C32 | 3,955. | |
| E159 | 62,292. | |
| A99 | 214. | |
| A106 | -1. | |
| C66 | -4,765. | |
| A112 | -7,218. | |
| A113C | 243,610. | |
| A113F | 715,089. | |
| A115A | 48,810. | |
| E184 | 1,252. | |
| A120D | 2,161,739. | |
| A120F | 685,323. | |
| A120H | -763,800. | |
| TOTAL TO SCHEDULE D, PART II, LINE 12 | 6,579,368. | |

THE J. PAUL GETTY TRUST

95-1790021

SCHEDULE D

NET LONG-TERM GAIN OR LOSS FROM
PARTNERSHIPS AND S-CORPORATIONS

STATEMENT 36

| DESCRIPTION OF ACTIVITY | GAIN OR LOSS | 28% GAIN |
|---------------------------------------|--------------|----------|
| E1 | 322,868. | |
| G3 | 33,667. | |
| C5 | 45,127. | |
| D3 | 97. | |
| A35 | -3. | |
| E27 | 2,592. | |
| A52 | 1,642,470. | |
| B15 | 863,162. | |
| A57 | -22. | |
| A59 | -49,299. | |
| A60 | 2,993. | |
| A61 | 407,952. | |
| G13 | 60. | |
| E110 | -4,362. | |
| C27 | -727. | |
| A88 | -12,842. | |
| A90 | -78. | |
| E131 | 72. | |
| E132 | 182,586. | |
| E133 | -516. | |
| E134 | -1,470. | |
| E135 | -312. | |
| C32B | -1,147. | |
| C32 | 3,955. | |
| E159 | 62,292. | |
| A99 | 214. | |
| A106 | -1. | |
| C66 | -4,765. | |
| A112 | -7,218. | |
| A113C | 243,610. | |
| A113F | 715,089. | |
| A115A | 48,810. | |
| E184 | 1,252. | |
| A120D | 2,161,739. | |
| A120F | 685,323. | |
| A120H | -763,800. | |
| TOTAL TO SCHEDULE D, PART II, LINE 12 | 6,579,368. | |

| DESCRIPTION | DATE ACQUIRED | DATE SOLD | SALES PRICE | DEPR. | COST OR BASIS | GAIN OR LOSS |
|-------------|---------------|-----------|-------------|-------|---------------|--------------|
| G1 | | | | | | -22,310. |
| E2 | | | | | | 22,409. |
| G3 | | | | | | -33. |
| E9 | | | | | | 138. |
| A19 | | | | | | 178,869. |
| D3 | | | | | | -236. |
| E13B | | | | | | -13,851. |
| A35 | | | | | | 1,154. |
| A48 | | | | | | 1,396. |
| E44 | | | | | | -212,443. |
| E45 | | | | | | -483,176. |
| A50 | | | | | | -624. |
| E48A | | | | | | -5. |
| E48 | | | | | | -2. |
| E59 | | | | | | 60,055. |
| E58 | | | | | | 30,624. |
| A52 | | | | | | 40,967. |
| A55 | | | | | | -20,574. |
| A56 | | | | | | -64,966. |
| E71 | | | | | | 102,472. |
| A59 | | | | | | 259. |
| A60 | | | | | | -726. |
| A61 | | | | | | 6. |
| E77 | | | | | | 155,822. |
| E78A | | | | | | 12,585. |
| E79 | | | | | | 257,340. |
| E84 | | | | | | -177,635. |
| E85 | | | | | | 28,739. |
| E92 | | | | | | -3,524. |
| A81 | | | | | | 4,419. |
| A90 | | | | | | 3. |
| E128 | | | | | | -6,452. |
| E132 | | | | | | -249,853. |
| E133 | | | | | | -102,848. |
| E134 | | | | | | 11,592. |
| E135 | | | | | | 11,998. |
| E146 | | | | | | 199,976. |
| E147 | | | | | | -23. |
| A95 | | | | | | -73,056. |
| E39 | | | | | | 206. |
| E156 | | | | | | 93,443. |
| E158 | | | | | | 52,215. |
| E159 | | | | | | -2,278. |
| E161 | | | | | | -483,273. |
| C49 | | | | | | -649,657. |
| E145 | | | | | | 67,156. |
| E167 | | | | | | 928,719. |
| A102 | | | | | | 6,928. |
| C57 | | | | | | -57,455. |
| C58 | | | | | | 631,288. |
| E171 | | | | | | -8,420. |
| E170 | | | | | | -1,169. |

| | |
|--------------------------------|-------------------|
| <u>THE J. PAUL GETTY TRUST</u> | <u>95-1790021</u> |
| E61 | -1. |
| A114A | -150. |
| A121 | -1,432. |
| E184 | 99,261. |
| E185 | 1,120,763. |
| A120D | -43. |
| A120E | 83. |
| A120G | 510. |
| A120H | -86,670. |
| A43 | -675. |
| A42 | -47,607. |
| | <hr/> |
| TOTAL TO 4797, PART I, LINE 2 | <u>1,350,228.</u> |

| | | |
|-----------|---------------------------|--------------|
| FORM 4797 | ORDINARY GAINS AND LOSSES | STATEMENT 38 |
|-----------|---------------------------|--------------|

| DESCRIPTION | DATE ACQUIRED | DATE SOLD | SALES PRICE | DEPR. | COST OR BASIS | GAIN OR LOSS |
|---------------------------------|------------------|--------------|----------------|-------|------------------|-------------------|
| E34 | | | | | | 69,824. |
| E41 | | | | | | 12,207. |
| G10 | | | | | | 173,731. |
| G24 | | | | | | 143,809. |
| E183 | | | | | | 702,947. |
| | | | | | | <hr/> |
| TOTAL TO 4797, PART II, LINE 10 | | | | | | <u>1,102,518.</u> |

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. | | |
| 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 | 22,409. |
| 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 | |

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.

OMB No. 1545-0184

2020

Attachment
Sequence No. **27**

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

THE J. PAUL GETTY TRUST

Identifying number
95-1790021

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 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) |
|---|---|-----------------------------------|-------------------------------|-----------------------|---|--|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| 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 | | | | | | 7 1,327,819. |
| Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, 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. | | | | | | | |
| 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 1,327,819. |

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):

| | | | | | | | |
|--|--|--|--|--|--|--|---------------|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| 11 | Loss, if any, from line 7 | | | | | | 11 () |
| 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 1,102,518. |
| 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 loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) 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 Schedule 1 (Form 1040), Part I, line 4 | | | | | | | 18b |

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

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. | | | | | |
| 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 | |

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.

OMB No. 1545-0184

2020

Attachment
Sequence No. **27**

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

THE J. PAUL GETTY TRUST

Identifying number
95-1790021

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 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) |
|----|-----------------------------|-----------------------------------|-------------------------------|-----------------------|---|--|---|
| E2 | | | | | | | 22,409. |

| | | | |
|---|---|---|---------|
| 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 | 7 | 22,409. |

Partnerships and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120-S, 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.

| | | | |
|---|---|---|---------|
| 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 | 22,409. |

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):

| | | | | | | |
|--|--|--|--|--|--|--|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | | |
|----|---|-----|-----|
| 11 | Loss, if any, from line 7 | 11 | () |
| 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 | |
| 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 loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) 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 Schedule 1 (Form 1040), Part I, line 4 | 18b | |

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

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. | | | | | |
| 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 | |

THE J. PAUL GETTY TRUST

95-1790021

| | | |
|------------|----------------------|--------------|
| FORM 990-T | CHANGE OF NAICS CODE | STATEMENT 39 |
|------------|----------------------|--------------|

IN ACCORDANCE WITH THE 2020 FORM 990-T INSTRUCTIONS, THE TAXPAYER UPDATED THE UNRELATED BUSINESS ACTIVITY CODE FOR ITS QUALIFYING PARTNERSHIP INVESTMENTS FROM 520000 TO 901101 SINCE THIS CODE MOST ACCURATELY DESCRIBES THE INVESTMENT ACTIVITIES.

- (1) 2-DIGIT NAICS CODE USED IN 2019: 520000
- (2) NON-NAICS BUSINESS ACTIVITY CODE USED IN 2020: 901101

THE J. PAUL GETTY TRUST

STATEMENT 40

EIN: 95-1790021

SALE OF PARTNERSHIP INTEREST - IRC SECTION 751 STATEMENT

NAICS CODE 901101

THE TAXPAYER HAS REPORTED ORDINARY INCOME UPON DISPOSITION OF UNITS AS DETAILED BELOW FROM PUBLICLY TRADED PARTNERSHIP INVESTMENTS AS PROVIDED BY THE GENERAL PARTNER. THESE AMOUNTS WERE DETERMINED IN ACCORDANCE WITH INTERNAL REVENUE CODE SECTION 751. THE DETAILED INFORMATION IS AVAILABLE AT THE OFFICES OF THE GENERAL PARTNER UPON REQUEST.

| INVESTMENT NAME | EIN | DATE(S) OF DISPOSITION | AMOUNT OF GAIN/(LOSS) |
|--------------------|------------|--|--------------------------|
| E23 | 82-1646447 | 05/04/2020; 11/19/2020 | \$ 55,608 |
| E34 | 20-5913059 | 02/06/2020; 03/26/2020; 03/27/2020; 04/30/2020; 05/04/2020 | \$ 69,824 |
| E41 | 43-1918951 | 03/05/2020; 03/20/2020 | \$ 12,207 |
| E65 | 30-0108820 | 02/13/2020; 02/25/2020; 03/27/2020; 03/30/2020; 04/27/2020; 06/05/2020; 06/08/2020; 06/09/2020; 06/10/2020; 06/19/2020; 07/06/2020; 08/06/2020; 09/24/2020; 11/18/2020; 11/19/2020 | \$ 1,575,287 |
| E67 | 76-0568219 | 02/21/2020; 02/25/2020; 03/27/2020; 03/30/2020; 04/27/2020; 05/29/2020; 06/05/2020; 06/10/2020; 06/12/2020; 07/31/2020; 09/29/2020; 11/10/2020; 12/04/2020 | \$ 1,054,220 |
| E68 | 46-4097730 | 05/04/2020; 05/05/2020; 05/06/2020 | \$ 3,773 |
| G9 | 37-1661577 | 6/17/2020 | \$ 103,472 |
| E72 | 76-0513049 | 09/29/2020; 11/18/2020 | \$ 925,036 |
| G48 | 74-3140887 | 04/27/2020; 04/28/2020; 04/29/2020; 04/30/2020; 05/01/2020; 05/04/2020; 05/05/2020; 05/06/2020; 05/07/2020; 05/08/2020 | \$ 173,731 |
| E116 | 73-1599053 | 02/25/2020; 03/30/2020; 04/21/2020; 06/05/2020; 06/19/2020; 07/31/2020; 09/04/2020; 12/04/2020 | \$ 497,719 |
| E127 | 27-0005456 | 01/30/2020; 02/21/2020; 02/25/2020; 06/05/2020 | \$ 760,970 |
| E150 | 38-3899432 | 02/10/2020; 02/11/2020; 04/21/2020; 04/24/2020; 04/27/2020; 04/28/2020; 06/05/2020; 06/08/2020; 06/09/2020; 07/06/2020; 08/13/2020; 09/04/2020 | \$ 450,164 |
| E152 | 76-0582150 | 02/25/2020; 04/21/2020; 06/10/2020; 08/05/2020; 11/18/2020 | \$ 204,820 |
| E164 | 46-5223743 | 02/20/2020; 04/16/2020; 04/17/2020; 04/28/2020; 05/04/2020; 09/29/2020; 11/19/2020; 11/20/2020 | \$ 200,856 |
| G50 | 52-2135448 | 05/04/2020; 05/05/2020 | \$ 143,809 |
| E182 | 46-0967367 | 01/29/2020; 01/30/2020; 02/14/2020; 04/27/2020; 07/31/2020; 09/29/2020 | \$ 989,532 |
| TOTAL | | | <u>\$ 7,221,028</u> |

Form **3468**

Investment Credit

OMB No. 1545-0155

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form3468 for instructions and the latest information.

2020

Attachment
Sequence No. **174**

Name(s) shown on return

Identifying number

THE J. PAUL GETTY TRUST

95-1790021

Part I Information Regarding the Election To Treat the Lessee as the Purchaser of Investment Credit Property

If you are claiming the investment credit as a lessee based on a section 48(d) (as in effect on November 4, 1990) election, provide the following information. If you acquired more than one property as a lessee, attach a statement showing the information below.

- 1 Name of lessor _____
- 2 Address of lessor _____
- 3 Description of property _____
- 4 Amount for which you were treated as having acquired the property ▶ \$ _____

Part II Qualifying Advanced Coal Project Credit, Qualifying Gasification Project Credit, and Qualifying Advanced Energy Project Credit

| | | |
|--|-----------|-----------|
| 5 Qualifying advanced coal project credit (see instructions): | | |
| a Qualified investment in integrated gasification combined cycle property placed in service during the tax year for projects described in section 48A(d)(3)(B)(i). \$ _____ x 20% (0.20) | 5a | |
| b Qualified investment in advanced coal-based generation technology property placed in service during the tax year for projects described in section 48A(d)(3)(B)(ii) \$ _____ x 15% (0.15) | 5b | |
| c Qualified investment in advanced coal-based generation technology property placed in service during the tax year for projects described in section 48A(d)(3)(B)(iii) \$ _____ x 30% (0.30) | 5c | |
| d Total. Add lines 5a, 5b, and 5c | 5d | |
| 6 Qualifying gasification project credit (see instructions): | | |
| a Qualified investment in qualified gasification property placed in service during the tax year for which credits were allocated or reallocated after October 3, 2008, and that includes equipment that separates and sequesters at least 75% of the project's carbon dioxide emissions \$ _____ x 30% (0.30) | 6a | |
| b Qualified investment in property other than in a above placed in service during the tax year \$ _____ x 20% (0.20) | 6b | |
| c Total. Add lines 6a and 6b | 6c | |
| 7 Qualifying advanced energy project credit (see instructions): | | |
| Qualified investment in advanced energy project property placed in service during the tax year \$ _____ x 30% (0.30) | 7 | |
| 8 Reserved for future use | | 8 |
| 9 Enter the applicable unused investment credit from cooperatives (see instructions). | | 9 |
| 10 Add lines 5d, 6c, 7, and 9. Report this amount on Form 3800, Part III, line 1a | | 10 |

For Paperwork Reduction Act Notice, see separate instructions.

Form **3468** (2020)

Part III Rehabilitation Credit and Energy Credit

11 Rehabilitation credit (see instructions for requirements that must be met):

a Check this box if you are electing under section 47(d)(5) to take your qualified rehabilitation expenditures into account for the tax year in which paid (or, for self-rehabilitated property, when capitalized). See instructions. **Note:** This election applies to the current tax year and to all later tax years. You may not revoke this election without IRS consent.

b Enter the dates on which the 24- or 60-month measuring period begins 02/01/2015 and ends 01/31/2020

c Enter the adjusted basis of the building as of the beginning date above (or the first day of your holding period, if later) \$ 448,276.00

d Enter the amount of the qualified rehabilitation expenditures incurred, or treated as incurred, during the period on line 11b above \$ 453,311.00
Enter the amount of qualified rehabilitation expenditures and multiply by the percentage shown:

e Pre-1936 buildings under the transition rule (see instructions) . \$ _____ x 10% (0.10) **11e**

f Certified historic structures under the transition rule (see instructions) . \$ _____ x 20% (0.20) **11f** 80,397.00

g Certified historic structures with expenditures paid or incurred after 2017 and not under the transition rule (see instructions) \$ _____ x 4% (0.04) **11g**

Note: This credit is allowed for a 5-year period beginning in the tax year that the qualified rehabilitated building is placed in service.
For properties identified on line 11f or 11g, complete lines 11h and 11i.

h Enter the assigned NPS project number or the pass-through entity's employer identification number (see instructions) 81-3804569

i Enter the date that the NPS approved the Request for Certification of Completed Work (see instructions) _____

12 Energy credit:

a Basis of property using geothermal energy placed in service during the tax year (see instructions) \$ _____ x 10% (0.10) **12a**

b Basis of property using solar illumination or solar energy placed in service during the tax year that is attributable to periods after December 31, 2005, and the construction of which began before 2020 (see instructions) \$ _____ x 30% (0.30) **12b**

c Basis of property using solar illumination or solar energy placed in service during the tax year and the construction of which began in 2020 (see instructions) \$ _____ x 26% (0.26) **12c**

d Basis of property using solar illumination or solar energy placed in service during the tax year and the construction of which began in 2021 (see instructions) \$ _____ x 22% (0.22) **12d**
Qualified fuel cell property (see instructions):

e Basis of property placed in service during the tax year that was acquired after December 31, 2005, and before October 4, 2008, and the basis attributable to construction, reconstruction, or erection by the taxpayer after December 31, 2005, and before October 4, 2008 \$ _____ x 30% (0.30) **12e**

f Applicable kilowatt capacity of property on line 12e (see instructions) . ▶ _____ x \$1,000 **12f**

g Enter the lesser of line 12e or line 12f **12g**

h Basis of property placed in service during the tax year that is attributable to periods after October 3, 2008, and the construction of which began before 2020 \$ _____ x 30% (0.30) **12h**

i Applicable kilowatt capacity of property on line 12h (see instructions) . ▶ _____ x \$3,000 **12i**

j Enter the lesser of line 12h or line 12i **12j**

k Basis of property placed in service during the tax year and the construction of which began in 2020 \$ _____ x 26% (0.26) **12k**

l Applicable kilowatt capacity of property on line 12k (see instructions) . ▶ _____ x \$3,000 **12l**

m Enter the lesser of line 12k or line 12l **12m**

n Basis of property placed in service during the tax year and the construction of which began in 2021 \$ _____ x 22% (0.22) **12n**

o Applicable kilowatt capacity of property on line 12n (see instructions) ▶ _____ x \$3,000 **12o**

p Enter the lesser of line 12n or line 12o **12p**
Qualified microturbine property (see instructions):

q Basis of property placed in service during the tax year that was acquired after December 31, 2005, and the basis attributable to construction, reconstruction, or erection by the taxpayer after December 31, 2005 \$ _____ x 10% (0.10) **12q**

r Kilowatt capacity of property on line 12q ▶ _____ x \$200 **12r**

s Enter the lesser of line 12q or line 12r **12s**

Part III Rehabilitation Credit and Energy Credit (continued)

| | | |
|--|--|-------------|
| Combined heat and power system property (see instructions): | | |
| Caution: You can't claim this credit if the electrical capacity of the property is more than 50 megawatts or has a mechanical energy capacity of more than 67,000 horsepower or an equivalent combination of electrical and mechanical energy capabilities. | | |
| t Basis of property placed in service during the tax year that was acquired after October 3, 2008, and the basis attributable to construction, reconstruction, or erection by the taxpayer after October 3, 2008 \$ _____ x 10% (0.10) | | 12t |
| u If the electrical capacity of the property is measured in: | | |
| • Megawatts, divide 15 by the megawatt capacity. Enter 1.0 if the capacity is 15 megawatts or less. | | 12u |
| • Horsepower, divide 20,000 by the horsepower. Enter 1.0 if the capacity is 20,000 horsepower or less | | 12v |
| v Multiply line 12t by line 12u | | |
| Qualified small wind energy property (see instructions): | | |
| w Basis of property placed in service during the tax year that was acquired after October 3, 2008, and before January 1, 2009, and the basis attributable to the construction, reconstruction, or erection by the taxpayer after October 3, 2008, and before January 1, 2009. \$ _____ x 30% (0.30) | | 12w |
| x Enter the smaller of line 12w or \$4,000 | | 12x |
| y Basis of property placed in service during the tax year that is attributable to periods after December 31, 2008, and the construction of which began before 2020 \$ _____ x 30% (0.30) | | 12y |
| z Basis of property placed in service during the tax year and the construction of which began in 2020 \$ _____ x 26% (0.26) | | 12z |
| aa Basis of property placed in service during the tax year and the construction of which began in 2021 \$ _____ x 22% (0.22) | | 12aa |
| Geothermal heat pump systems (see instructions): | | |
| bb Basis of property placed in service during the tax year that was acquired after October 3, 2008, and the basis attributable to construction, reconstruction, or erection by the taxpayer after October 3, 2008 \$ _____ x 10% (0.10) | | 12bb |
| Qualified investment credit facility property (see instructions): | | |
| cc Basis of property the construction of which began before 2021 (other than wind facility property and the construction of which began after 2016) placed in service during the tax year \$ _____ x 30% (0.30) | | 12cc |
| dd Basis of wind facility property placed in service during the tax year and the construction of which began during 2017 \$ _____ x 24% (0.24) | | 12dd |
| ee Basis of wind facility property placed in service during the tax year and the construction of which began during 2018 \$ _____ x 18% (0.18) | | 12ee |
| ff Basis of wind facility property placed in service during the tax year and the construction of which began during 2019 \$ _____ x 12% (0.12) | | 12ff |
| gg Basis of wind facility property placed in service during the tax year and the construction of which began during 2020 \$ _____ x 18% (0.18) | | 12gg |
| 13 Enter the applicable unused investment credit from cooperatives (see instructions) | | 13 |
| 14 Add lines 11e, 11f, 11g, 12a, 12b, 12c, 12d, 12g, 12j, 12m, 12p, 12s, 12v, 12x, 12y, 12z, 12aa, 12bb, 12cc, 12dd, 12ee, 12ff, 12gg, and 13. Report this amount on Form 3800, Part III, line 4a. | | 14 |
| | | 80,397.00 |

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.

2020
Attachment
Sequence No. **51**

Name(s) shown on return

THE J. PAUL GETTY TRUST

Identifying number

95-1790021

Part I Total Investment Interest Expense

| | | | |
|----------|--|----------|------------|
| 1 | Investment interest expense paid or accrued in 2020 (see instructions) | 1 | 518,159.00 |
| 2 | Disallowed investment interest expense from 2019 Form 4952, line 7 | 2 | |
| 3 | Total investment interest expense. Add lines 1 and 2. | 3 | 518,159.00 |

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 | 1,357,741.00 | |
| 4b | Qualified dividends included on line 4a | 4b | 29,389.00 | |
| 4c | Subtract line 4b from line 4a | 4c | | 1,328,352.00 |
| 4d | Net gain from the disposition of property held for investment | 4d | 7,684,837.00 | |
| 4e | Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment. See instructions | 4e | 6,579,368.00 | |
| 4f | Subtract line 4e from line 4d | 4f | | 1,105,469.00 |
| 4g | Enter the amount from lines 4b and 4e that you elect to include in investment income. See instructions | 4g | | |
| 4h | Investment income. Add lines 4c, 4f, and 4g | 4h | | 2,433,821.00 |
| 5 | Investment expenses (see instructions) | 5 | | 109,900.00 |
| 6 | Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0- | 6 | | 2,323,921.00 |

Part III Investment Interest Expense Deduction

| | | | |
|----------|---|----------|------------|
| 7 | Disallowed investment interest expense to be carried forward to 2021. Subtract line 6 from line 3. If zero or less, enter -0- | 7 | |
| 8 | Investment interest expense deduction. Enter the smaller of line 3 or line 6. See instructions | 8 | 518,159.00 |

For Paperwork Reduction Act Notice, see page 4.

Form **4952** (2020)

Form **8978**

Partner's Additional Reporting Year Tax

OMB No. 1545-0123

(December 2019)
Department of the Treasury
Internal Revenue Service

▶ Go to www.irs.gov/Form8978 for instructions and the latest information.

Attachment
Sequence No. **57**

Name of partner(s)

Partner tax ID number

THE J. PAUL GETTY TRUST

95-1790021

Part I Computation of Additional Reporting Year Tax (see instructions)

| | | (a) | (b) | (c) | (d) |
|-----------|---|--------------------------|----------------|----------------|----------------|
| | | Tax Year Ended | Tax Year Ended | Tax Year Ended | Tax Year Ended |
| | | 06/30/2019 | 06/30/2020 | 06/30/2021 | 06/30/2022 |
| 1a | Total income per original return or as previously adjusted | 1a -35,446,092.00 | | | |
| b | Adjustments to income from Schedule A (Form 8978), line 2, columns (a) through (d) | 1b | | | |
| 2 | Combine lines 1a and 1b and enter the corrected income. See instructions | 2 -35,446,092.00 | | | |
| 3a | Total deductions per original return or as previously adjusted | 3a | | | |
| b | Adjustments to deductions from Schedule A (Form 8978), line 4, columns (a) through (d) | 3b | | | |
| 4 | Combine lines 3a and 3b and enter the corrected deductions. See instructions | 4 | | | |
| 5 | Corrected taxable income. Subtract line 4 from line 2 | 5 -35,446,092.00 | | | |
| 6 | Income tax on line 5 (see instructions). | 6 | | | |
| 7 | Alternative minimum tax on line 5 (see instructions) | 7 26,747.00 | | | |
| 8 | Total corrected income tax. Add lines 6 and 7 | 8 26,747.00 | | | |
| 9a | Total credits per original return or as previously adjusted | 9a | | | |
| b | Adjustments to credits from Schedule A (Form 8978), line 6, columns (a) through (d) | 9b | | | |
| 10 | Combine lines 9a and 9b and enter the corrected credits. See instructions | 10 | | | |
| 11 | Total corrected income tax liability. Subtract line 10 from line 8 | 11 26,747.00 | | | |
| 12 | Total income tax shown on original return or as previously adjusted | 12 26,747.00 | | | |
| 13 | Increase/Decrease to tax. Subtract line 12 from line 11, columns (a) through (d) | 13 | | | |
| 14 | Total increase/decrease to reporting year tax. Add line 13, columns (a) through (d). Enter here and on the appropriate line on your tax return. | 14 | | | |

Part II Penalties (see instructions)

| | | | | | |
|-----------|---|-----------|--|--|--|
| 15 | Penalties | 15 | | | |
| 16 | Total penalties. Add line 15, columns (a) through (d) | 16 | | | |

Part III Interest (see instructions)

| | | | | | |
|-----------|--|-----------|--|--|--|
| 17 | Interest | 17 | | | |
| 18 | Total interest. Add line 17, columns (a) through (d) | 18 | | | |

For Paperwork Reduction Act Notice, see separate instructions.

Form **8978** (12-2019)

THE J. PAUL GETTY TRUST

95-1790021

ATTACHMENT 1

FORM 8978 - PARTNER'S ADDITIONAL REPORTING YEAR TAX

ARCLIGHT ENERGY PARTNERS FUND V LP EIN: 80-0334664

A FORM 8986 WAS RECEIVED BY THE TAXPAYER FROM ARCLIGHT ENERGY PARTNERS FUND V LP, WHERE THE TAXPAYER OWNS A LIMITED PARTNERSHIP INTEREST. THE FORM 8986 REPORTED AN INCREASE OF REPORTED LINE 6 DIVIDEND INCOME OF \$25,441 AS A RESULT OF FOREIGN TAX REDETERMINATIONS AS DEFINED IN TREAS. REG. SEC. 1.905-3(A). NONE OF DIVIDENDS REPORTED ON THE SCHEDULE K-1 WERE UNRELATED BUSINESS TAXABLE INCOME TO THE TAXPAYER, THEREFORE THERE WAS NO TAX IMPACT.

BRAZOS EQUITY FUND III LP EIN: 61-1707418

A FORM 8986 WAS RECEIVED BY THE TAXPAYER FROM BRAZOS EQUITY FUND III LP, WHERE THE TAXPAYER OWNS A LIMITED PARTNERSHIP INTEREST. THE FORM 8986 REPORTED AN INCREASE OF REPORTED LINE 9 CAPITAL GAINS OF \$22,718 AND A DECREASE OF LINE 11 OTHER INCOME (LOSS) OF \$23,054 AS A RESULT OF A FORM 8986 RECEIVED FROM A LOWER TIER PARTNERSHIP. NONE OF THE INCOME REPORTED ON THE SCHEDULE K-1 WAS UNRELATED BUSINESS TAXABLE INCOME TO THE TAXPAYER, THEREFORE THERE WAS NO TAX IMPACT.

OLD IRONSIDES ENERGY FUND II-B LP EIN: 81-50590353

A FORM 8986 WAS RECEIVED BY THE TAXPAYER FROM OLD IRONSIDES ENERGY FUND II-B LP, WHERE THE TAXPAYER OWNS A LIMITED PARTNERSHIP INTEREST. THE FORM 8986 REPORTED AN INCREASE OF REPORTED LINE 1 ORDINARY BUSINESS INCOME OF \$143,915 AND A DECREASE OF LINE 9 CAPITAL GAIN INCOME OF THE SAME \$143,915 DUE TO A FORM 8986 RECEIVED FROM A LOWER TIER PARTNERSHIP. THE RECHARACTERIZATION OF PREVIOUSLY REPORTED CAPITAL GAINS TO ORDINARY INCOME WOULD NOT HAVE A TAX IMPACT TO THE TAXPAYER.