

Filing Checklist for 2016 Tax Return Filed On Standard Forms

Prepared on: 07/07/2017 01:31:04 pm

Return: P:\Murphy Higgins\2018 Edition\Appendix A\Final Appendix A\William Schnappauf 2016 Tax Return - P1.T16

To file your 2016 tax return, simply follow these instructions:

Step 1. Sign and date the return

Because you're filing a joint return, William and Joyce both need to sign the tax return.

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2. Assemble the return

These forms should be assembled behind Form 1040 --U.S. Individual Income Tax Return

- Schedule B
- - Attachments Worksheet

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (USC Equipment Corporation)

Form W-2G: Statement of Gambling Income

1st (Yardly Casino)

Step 3. Mail the return

Mail the return to this address:

**Department of the Treasury
Internal Revenue Service
Kansas City, MO 64999-0002**

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.
- DHL Express, Express 9:00, Express 10:30, Express 12:00, Express Worldwide, Express Envelope, Import Express 10:30, Import Express 12:00, and Import Express Worldwide.
- FedEx First Overnight, Priority Overnight, Standard Overnight, 2 Day, International Next Flight Out, International Priority, International First, or International Economy.
- United Parcel Service Next Day Air Early AM, Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 4. Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- Background Worksheet
- Dependents Worksheet
- Last Year's Data Worksheet
- Form 1099-INT/OID
- Form 1099-DIV
- Form 1099-G
- Health Care Coverage
- Health Care Summary
- Shared Responsibility Payment

2016 return information - Keep this for your records

Here is some additional information about your 2016 return. Keep this information with your records.

You will need your 2016 AGI to electronically sign your return next year.

Quick Summary

Income		\$164,818
Adjustments	-	\$0
Adjusted gross income		\$164,818

Deductions	-	\$12,600
Exemption(s)	-	\$20,250
Taxable income		\$131,968
 Tax withheld or paid already		 \$25,302
Actual tax due	-	\$24,309
Refund applied to next year	-	\$0
Refund		\$993

* Your long-term capital gains and qualifying dividends are taxed at a lower rate than your other income. As a result, your total federal tax is less than the tax shown on the IRS's Tax Table.

For the year Jan. 1-Dec. 31, 2016, or other tax year beginning , 2016, ending , 20

Your first name and initial: William Last name: Schnappauf Your social security number: 150-52-0546

If a joint return, spouse's first name and initial: Joyce Last name: Schnappauf Spouse's social security number: 371-42-5207

Home address (number and street). If you have a P.O. box, see instructions. 27 Northup Street Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Wakefield RI 02879

Foreign country name Foreign province/state/country Foreign postal code

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

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

Filing Status 1 Single 2 Married filing jointly (even if only one had income) 3 Married filing separately. Enter spouse's SSN above and full name here. 4 Head of household (with qualifying person). (See instr.) If the qualifying person is a child but not your dependent, enter this child's name here. 5 Qualifying widow(er) with dependent child

Check only one box.

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

Boxes checked on 6a and 6b: 2

No. of children on 6c who: 3

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

Dependents on 6c not entered above

Add numbers on lines above: 5

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) X if child under age 17 qualifying for child tax credit (see instructions)
Will	Schnappauf	372-46-2611	Son	
Dan	Schnappauf	377-42-3411	Son	
Tom	Schnappauf	375-49-6511	Son	

d Total number of exemptions claimed

Income 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 152,272

8a Taxable interest. Attach Schedule B if required 8a 2,129

b Tax-exempt interest. Do not include on line 8a 8b 1,665

9a Ordinary dividends. Attach Schedule B if required 9a 2,149

b Qualified dividends 9b 2,149

10 Taxable refunds, credits, or offsets of state and local income taxes 10 818

11 Alimony received 11

12 Business income or (loss). Attach Schedule C or C-EZ 12 0

13 Capital gain or (loss). Attach Schedule D if required. If not required, check here X 13 105

14 Other gains or (losses). Attach Form 4797 14

15a IRA distributions 15a b Taxable amount 15b 0

16a Pensions and annuities 16a b Taxable amount 16b 0

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

18 Farm income or (loss). Attach Schedule F 18 0

19 Unemployment compensation 19

20a Social security benefits 20a b Taxable amount 20b 0

21 Other income. List type and amount SEE ATTACHED 21 7,345

22 Combine the amounts in the far right column for lines 7 through 21. This is your total income 22 164,818

Adjusted Gross Income 23 Educator expenses 23 0

24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ 24 0

25 Health savings account deduction. Attach Form 8889 25 0

26 Moving expenses. Attach Form 3903 26 0

27 Deductible part of self-employment tax. Attach Schedule SE 27 0

28 Self-employed SEP, SIMPLE, and qualified plans 28 0

29 Self-employed health insurance deduction 29

30 Penalty on early withdrawal of savings 30 0

31a Alimony paid b Recipient's SSN 31a

32 IRA deduction 32 0

33 Student loan interest deduction 33

34 Tuition and fees. Attach Form 8917 34

35 Domestic production activities deduction. Attach Form 8903 35 0

36 Add lines 23 through 35 36 0

37 Subtract line 36 from line 22. This is your adjusted gross income 37 164,818

Tax and Credits

Standard Deduction for—

• People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.

• All others:

Single or Married filing separately, \$6,300

Married filing jointly or Qualifying widow(er), \$12,600

Head of household, \$9,300

38	Amount from line 37 (adjusted gross income)	38	164,818
39a	Check <input type="checkbox"/> You were born before January 2, 1952, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1952, <input type="checkbox"/> Blind. Total boxes checked ▶ 39a	0	
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	12,600
41	Subtract line 40 from line 38	41	152,218
42	Exemptions. If line 38 is \$155,650 or less, multiply \$4,050 by the number on line 6d. Otherwise, see instructions	42	20,250
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	131,968
44	Tax (see instructions). Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/>	44	24,309
45	Alternative minimum tax (see instructions). Attach Form 6251	45	0
46	Excess advance premium tax credit repayment. Attach Form 8962	46	
47	Add lines 44, 45, and 46	47	24,309
48	Foreign tax credit. Attach Form 1116 if required	48	0
49	Credit for child and dependent care expenses. Attach Form 2441	49	
50	Education credits from Form 8863, line 19	50	
51	Retirement savings contributions credit. Attach Form 8880	51	0
52	Child tax credit. Attach Schedule 8812, if required	52	
53	Residential energy credits. Attach Form 5695	53	
54	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	54	0
55	Add lines 48 through 54. These are your total credits	55	0
56	Subtract line 55 from line 47. If line 55 is more than line 47, enter -0-	56	24,309

Other Taxes

57	Self-employment tax. Attach Schedule SE	57	0
58	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	58	0
59	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	59	0
60a	Household employment taxes from Schedule H	60a	0
b	First-time homebuyer credit repayment. Attach Form 5405 if required	60b	0
61	Health care: individual responsibility (see instructions) Full-year coverage <input checked="" type="checkbox"/>	61	0
62	Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Form 8960 c <input type="checkbox"/> Instructions; enter code(s)	62	0
63	Add lines 56 through 62. This is your total tax	63	24,309

Payments

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax withheld from Forms W-2 and 1099	64	25,302
65	2016 estimated tax payments and amount applied from 2015 return	65	0
66a	Earned income credit (EIC)	66a	
b	Nontaxable combat pay election	66b	
67	Additional child tax credit. Attach Schedule 8812	67	
68	American opportunity credit from Form 8863, line 8	68	
69	Net premium tax credit. Attach Form 8962	69	
70	Amount paid with request for extension to file	70	
71	Excess social security and tier 1 RRTA tax withheld	71	0
72	Credit for federal tax on fuels. Attach Form 4136	72	
73	Credits from Form: a <input type="checkbox"/> 2439 b <input checked="" type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>	73	0
74	Add lines 64, 65, 66a, and 67 through 73. These are your total payments	74	25,302

Refund

Direct deposit? See instructions.

75	If line 74 is more than line 63, subtract line 63 from line 74. This is the amount you overpaid	75	993
76a	Amount of line 75 you want refunded to you. If Form 8888 is attached, check here	76a	993
b	Routing number XXXXXXXXXX	c	Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number XXXXXXXXXXXXXXXXXXXX		
77	Amount of line 75 you want applied to your 2017 estimated tax	77	0

Amount You Owe

78	Amount you owe. Subtract line 74 from line 63. For details on how to pay, see instructions	78	
79	Estimated tax penalty (see instructions)	79	

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☐ Yes. Complete below ☒ No

Designee's name ▶	Phone no. ▶	Personal identification number (PIN) ▶
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Sign Here

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

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	Signature	Date	Your occupation	Daytime phone number
	Your signature		Sales Manager	401-889-9898
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
			Author	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
Firm's name ▶	Firm's EIN ▶	Phone no.		
Firm's address ▶				

SCHEDULE B
(Form 1040A or 1040)(Rev. January 2017)
Department of the Treasury
Internal Revenue Service (99)**Interest and Ordinary Dividends**▶ **Attach to Form 1040A or 1040.**▶ **Information about Schedule B and its instructions is a www.irs.gov/scheduleb.**

OMB No. 1545-0074

2016Attachment
Sequence No. **08**

Name(s) shown on return

William

Schnappauf

Your social security number

150-52-0546

Part I
Interest(See instructions for
Schedule B, and the
instructions for
Form 1040A, or
Form 1040,
line 8a.)**Note:** If you
received a Form
1099-INT, Form
1099-OID, or
substitute
statement from
a brokerage firm,
list the firm's
name as the
payer and enter
the total interest
shown on that
form.

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

Wakefield Savings

Hawthorn Savings

NJ Economic Development Bonds

NYC Municipal Bonds

Ford Motor Bonds

United Insurance

Amount

615

417

0

0

717

380

1

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

2,129

2**3**

2,129

4**Note:** If line 4 is over \$1,500, you must complete Part III.**Amount****Part II****Ordinary
Dividends**(See instructions
for Schedule B, and the
instructions for
Form 1040A, or
Form 1040,
line 9a.)**Note:** If you
received a Form
1099-DIV or
substitute
statement from
a brokerage firm,
list the firm's
name as the
payer and enter
the ordinary
dividends shown
on that form.

- 5**
- List name of payer ▶
-
- Pfizer Corporation
-
- Apple
-
- Collingwood Capital Fund
-
- Coca-Cola Corporation

210

391

176

1,372

5

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

2,149

6**Note.** If line 6 is over \$1,500, you must complete Part III.**Part III**
**Foreign
Accounts
and Trusts**(See
instructions.)

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

- 7a**
- At any time during 2016, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions.
-
- If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements
-
- b**
- If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located ▶
-
- 8**
- During 2016, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions.

Yes**No**

**ATTACHMENTS WORKSHEET
OTHER INCOME
Form 1040, Line 21**

**2016
2016**

Name: William Schnappauf **Soc Sec No:** 150-52-0546

Type of Income	Amount
1. Child's interest and dividend income from Form 8814	1 <u>0</u>
2. Gambling winnings	2 <u>6,200</u>
3. Non-business rentals of pers prop from 1099-MISC, Box 1	3 <u>0</u>
4. Prizes, awards, damages, etc. from Form 1099-MISC, Box 3	4 <u>0</u>
5. Nonemployee compensation from Form 1099-MISC, Box 7	5 <u>0</u>
6. Payments in lieu of int or div from Form 1099-MISC, Box 8	6 <u>0</u>
7. Foreign earned income or housing excl. (enter as negative)	
a. Form 2555	7a <u>0</u>
b. Form 2555-EZ	7b <u>0</u>
8. Refunds and reimbursements of tax benefit items	
a. Medical expenses	8a <u> </u>
b. Real estate taxes	8b <u> </u>
c. Overpaid home mortgage interest	8c <u>0</u>
d. General sales taxes	8d <u> </u>
e. Other items	8e <u> </u>
f. From K-1's	8f <u>0</u>
9. Jury fees-enter even if gave to employer	9 <u> </u>
10. Nonprofessional fiduciary fees	10 <u> </u>
11. Alaska Permanent Fund dividends	11 <u> </u>
12. Income from for-profit rental of personal property	12 <u> </u>
13. Income from non-profit activity	13 <u> </u>
14. Recapture of clean-fuel vehicle deduction	14 <u> </u>
15. Loss on corrective distrib. made in 2016 (enter as neg)	15 <u> </u>
16. Net operating loss carried forward to 2016 (enter as neg)	16 <u>0</u>
Explanation	<u> </u>
17. Archer MSA distributions	17 <u>0</u>
18. Medicare Advantage MSA distributions	18 <u>0</u>
19. Long-term care payments	19 <u>0</u>
20. Taxable grants from Form(s) 1099-G	20 <u>0</u>
21. Taxable distributions from a qualified tuition program (QTP):	
Yours	21a <u> </u>
Your spouse's	21b <u> </u>
22. Taxable distributions from a Coverdell education savings account (ESA):	
Yours	22a <u> </u>
Your spouse's	22b <u> </u>
23. Taxable distributions from an ABLE account:	
Yours	23a <u> </u>
Your spouse's	23b <u> </u>
24. Taxable HSA distributions	24 <u>0</u>
25. ATAA or RTAA payments	25 <u>0</u>
26. Income from cancellation of debt	26 <u> </u>
27. Taxable part of disaster relief payments	27 <u> </u>
	You Spouse
28. Excludable Medicaid waiver payments on W-2	28 <u> </u>
Enter as a negative	
29. Excludable Medicaid waiver payments on 1099-MISC, Box 3	29 <u> </u>
Enter as a negative	
30. Olympic or Paralympic medals and prizes	30 <u> </u>
31. Other: <u>Cash Prize</u>	31a <u>300</u>
<u>Tablet</u>	31b <u>595</u>

PTO 31c 250

32. Total of all income items for line 21 32 7,345

ALIMONY PAID 2016

2016

Amount Paid

0

2016

OTHER ADJUSTMENTS
Form 1040, Line 36

2016

Name: William Schnappauf Soc Sec No: 150-52-0546

Type of Adjustment		Description	Amount
1.	Foreign housing deduction	<u> </u>	<u>1</u> <u> 0</u>
2.	Jury duty pay given to employer	<u> </u>	<u>2</u> <u> </u>
3.	Reforestation amortization and expenses	<u> </u>	<u>3</u> <u> </u>
4.	Repayment of sub-pay under Trade Act of 1974	<u> </u>	<u>4</u> <u> </u>
5.	Contribs to section 501(c)(18)(D) plans	<u> </u>	<u>5</u> <u> 0</u>
6.	Expenses from rental of personal property	<u> </u>	<u>6</u> <u> </u>
7.	Contributions by chaplains to 403(b) plans	<u> </u>	<u>7</u> <u> </u>
8.	Archer MSA deduction (Form 8853)	<u> </u>	<u>8</u> <u> 0</u>
9.	Attorney fees and court costs for actions involving certain unlawful discrimination claims (see instr)	<u> </u>	<u>9</u> <u> </u>
10.	Attorney fees and court costs paid by you in connection with an award from the IRS for information you provided that helped the IRS detect tax law violations (see instructions)	<u> </u>	<u>10</u> <u> </u>
11.	Olympic or Paralympic medals and prizes if AGI is not more than \$1 million (\$500,000 if married filing separately)	<u> </u>	<u>11</u> <u> </u>
12.	Total of adjustments for line 36	<u> </u>	<u>12</u> <u> 0</u>

OTHER TAXES

2016

OTHER TAXES
Form 1040, Line 62

2016

Name: William Schnappauf Soc Sec No: 150-52-0546

Type of Tax		Descrip	Amount
1.	Recapture of investment credit (Form 4255)		1
2.	Recapture of low-income housing cr (8611)		2
3.	Interest from Form 8621, line 16f, relating to distributions from and dispositions of stock of a section 1291 fund		3
4.	Recapture of Indian employment credit		4
5.	Recapture of Fed mortgage subsidy (Fm 8828)		5
6.	Recapture of new markets crdt (see Fm 8874)		6
7.	Recapture of credit for employer-provided child care facilities (see Form 8882)		7
8.	Recapture of alternative motor vehicle credit (see Form 8910)		8
9.	Recapture of alternative fuel vehicle refueling property credit (see Form 8911)		9
10.	Recapture of qualified plug-in electric drive motor vehicle cr (see Form 8936)		10
11.	Section 72(m)(5) excess benefits tax		11
12.	FICA and Medicare owed on tips, life ins		12 0
13.	Tax on excess parachute payments		13 0
14.	Tax on accum distrib of trusts (Form 4970)		14
15.	Tax on Archer MSA distributions (Fm 8853)		15 0
16.	Tax on Med+MSA distributions (Form 8853)		16 0
17.	Excise tax on insider stock compensation from an expatriated corporation		17
18.	Tax on HSA distributions (Fm 8889, Pt II)		18 0
19.	Additional tax for failure to maintain HDHP coverage (Fm 8889, Pt III)		19 0
20.	Additional tax on income received from nonqualified deferred compensation plan that fails to meet requirements (IRC 409A)		20
21.	Interest on tax due on installment income from sale of certain residential lots and timeshares		21
22.	Interest on deferred tax on gain from certain installment sales with a sales price over \$150,000		22
23.	Additional tax on recapture of a charitable donation deduction relating to the donation of a fractional interest in tangible personal property		23
24.	Look-back interest under section 167(g) or 460(b)		24
25.	Additional tax on certain compensation received from a nonqualified deferred compensation plan described in section 457A		25
26.	Interest amount from Form 8621, line 24		26
27.	Total additional taxes for line 62		27 0

MISCELLANEOUS ITEMS

2016

MISCELLANEOUS ITEMS		2016	
Name: William Schnappauf		Soc Sec No: 150-52-0546	
I. MISCELLANEOUS INCOME ITEMS			
1. IRA contribution made in 2016 and returned in 2017	You	Spouse	
a. Total amount distributed from IRA (original contribution, plus earnings or minus loss)			
b. Earnings, if any, on contribution. Do not enter a negative number			
i. Traditional IRA			
ii. Roth IRA			
You:			
Spouse:			
2. Wages received for work done as an inmate in a penal institution			
II. MISCELLANEOUS ADJUSTMENTS			
1. Educator expenses	1	0	
2. Domestic production activities deduction from cooperatives (Form 1099-PATR, box 6)	2		
III. MISCELLANEOUS CREDITS, EXCLUSIONS, AND TAXES			
1. Exclusion of income from American Samoa (Form 4563)	1		
2. Exclusion of income from Puerto Rico	2		
3. Exclusion of income from Guam	3		
4. Exclusion of income from Northern Mariana Islands	4		
5. Recapture of education credit (see Form 8863 instr)	5		
6. Credit for federal tax paid on fuels (Form 4136)	6		
MISCELLANEOUS ITEMS		2016	

	MISCELLANEOUS ITEMS	2016
IV.	MISCELLANEOUS PENSION AND ANNUITY PLAN ITEMS	
1.	Recapture amount on distribution from a designated Roth account allocable to an in-plan Roth rollover - Self	1
2.	Recapture amount on distribution from a designated Roth account allocable to an in-plan Roth rollover - Spouse	2