

COVER PAGE

Filing Checklist for 2013 Tax Return Filed On Standard Forms

Prepared on: 11/25/2013 05:02:52 pm

Return: C:\Users\Smokey\Desktop\Tax\2013 Whittenburg\Leon Lazo 2013 Tax Return.T13

To file your 2013 tax return, simply follow these instructions:

Step 1. Sign and date the return

Because you're filing a joint return, Leon and Leslie 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

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

Form W-2: Wage and Tax Statement

1st

Step 3. Mail the return

Mail the return to this address:

Department of the Treasury
Internal Revenue Service
Fresno, CA 93888-0002

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 Same Day Service.
- FedEx Priority Overnight, Standard Overnight, 2Day, International Priority, or International First.
- United Parcel Service 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

2013 return information - Keep this for your records

Here is some additional information about your 2013 return. Keep this information with your records.

You will need your 2013 AGI to electronically sign your return next year.

Quick Summary

Income		\$50,000
Adjustments	-	\$0
Adjusted gross income		\$50,000
Deductions	-	\$12,200
Exemption(s)	-	\$11,700
Taxable income		\$26,100
 Tax withheld or paid already		 \$4,600
Actual tax due	-	\$3,026
Refund applied to next year	-	\$0
Refund		\$1,574

For the year Jan. 1–Dec. 31, 2013, or other tax year beginning , 2013, ending , 20 See separate instructions.

Your first name and initial Last name
Leon Lazo
Your social security number
467-74-4451

If a joint return, spouse's first name and initial Last name
Leslie Lazo
Spouse's social security number
466-47-3311

Home address (number and street). If you have a foreign address, see instructions. Do not include apartment, suite, or unit number, or P.O. box, or care package address, unless you are sure the address is correct, and on line 6c are correct.
143 Snapdragon Drive

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
Reno NV 82102

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

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 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.
2 ☒ Married filing jointly (even if only one had income) 5 ☐ Qualifying widow(er) with dependent child
3 ☐ Married filing separately. Enter spouse's SSN above and full name here.

Check only one box.

Exemptions 6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a
b ☒ Spouse
c Dependents:
(1) First name Last name Social security number (2) Relationship to you (3) Age (4) Under age 17 (5) Qualifying for child tax credit (see instructions)
If more than four dependents, see instructions and check here ☐
d Total number of exemptions claimed

Boxes checked on 6a and 6b 2
No. of children on 6c who:
• lived with you 1
• did not live with you due to divorce (see instructions) 1
Dependents on 6c not entered above
Add numbers on lines above 3

Income 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 50,000
8a Taxable interest. Attach Schedule B if required 8a
b Tax-exempt interest. Do not include on line 8a 8b 0
9a Ordinary dividends. Attach Schedule B if required 9a 0
b Qualified dividends 9b 0
10 Taxable refunds, credits, or offsets of state and local income taxes 10 0
11 Alimony received 11 0
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 ☐ 13 0
14 Other gains or (losses). Attach Form 4797 14
15a IRA distributions 15a b Taxable amount 15b 0
16a Rollovers from IRAs with no taxable amount 16a b Taxable amount 16b 0
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 17 0
18 Farm income or (loss). Attach Schedule F 18 0
19 Unemployment compensation 19
20a Social security benefits 20a b Taxable amount 20b
21 Other income. List type and amount 21 0
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income 22 50,000

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.
If you did not get a W-2, see instructions.

Adjusted Gross Income 23 Educator expenses 23
24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ 24 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 0
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 deduction. Attach Form 8863 34
35 Domestic production activities deduction. Attach Form 8803 35 0
36 Add lines 23 through 35 36 0
37 Subtract line 36 from line 22. This is your adjusted gross income 37 50,000

DRAFT FORM -- DO NOT FILE.
Final form will be available through a program update.

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, \$6,100
Married filing jointly or Qualifying widow(er), \$12,200
Head of household, \$8,950

38	Amount from line 37 (adjusted gross income)	38	50,000
39a	Check <input type="checkbox"/> You were born before January 2, 1949, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1949, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here <input type="checkbox"/> 39b		
40	Itemized deductions (from Schedule A) or your standard deduction (see instructions)	40	12,200
41	Subtract line 40 from line 38	41	37,800
42	Exemption allowance. If more than \$10,000 or less than \$5,000, attach Form 1040-EX. Otherwise, see instructions.	42	1,700
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	26,100
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	3,026
45	Alternative minimum tax (see instructions). Attach Form 6251	45	0
46	Add lines 44 and 45	46	3,026
47	Foreign tax credit. Attach Form 1116 if required	47	0
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	0
51	Child tax credit. Attach Schedule 8812, if required	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	0
54	Add lines 47 through 53. These are your total credits	54	0
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter 0	55	3,026

Other Taxes

56	Self-employment tax. Attach Schedule SE	56	0
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	0
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	0
59a	Household employment taxes from Schedule H	59a	0
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	0
60	Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Form 8960 c <input type="checkbox"/> Instructions; enter code(s)	60	0
61	Add lines 55 through 60. This is your total tax	61	3,026

Payments

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	4,600
63	2013 estimated tax payments and amount applied from 2012 return	63	0
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election	64b	
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	
69	Excess social security and tier 1 RRTA tax withheld	69	0
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>	71	0
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	4,600

Refund

Direct deposit? See instructions.

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	1,574
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a	1,574
b	Routing number XXXXXXXXX	c	Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number XXXXXXXXXXXXXXXXXXXX		
75	Amount of line 73 you want applied to your 2014 estimated tax	75	0

Amount You Owe

76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions	76	
77	Estimated tax penalty (see instructions)	77	

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) _____

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 complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature _____ Date _____ Your occupation _____ Daytime phone number _____

Spouse's signature, if a joint return, both must sign. _____ Date _____ Spouse's occupation _____ If the IRS sent you an Identity Protection Notice (IPN), enter the IPN number (see instructions) _____

Paid Preparer Use Only

Print/Type preparer's name _____ Preparer's signature _____ Date _____ Check ☐ if self-employed PTIN _____

Firm's name _____ Firm's EIN _____ Phone no. _____

Firm's address _____