

## COVER PAGE

### Filing Checklist for 2013 Tax Return Filed On Standard Forms

Prepared on: 11/25/2013 04:52:48 pm

Return: C:\Users\Smokey\Desktop\Tax\2013 Whittenburg\Patty Bayan 2013 Tax Return.T13

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

#### Step 1. Sign and date the 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  
Austin, TX 73301-0002**

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
- 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		\$19,400
Adjustments	-	\$0
<b>Adjusted gross income</b>		<b>\$19,400</b>
Deductions	-	\$6,100
Exemption(s)	-	\$3,900
<b>Taxable income</b>		<b>\$9,400</b>
 Tax withheld or paid already		 \$3,000
Actual tax due	-	\$968
Refund applied to next year	-	\$0
<b>Refund</b>		<b>\$2,032</b>

For the year Jan 1-Dec 31, 2013 or other year from to OMB No.1545-0074

1st Name, MI Last Name Jr

Your Name: Patty Bayan 466-33-1234

Spouse Name:

Street, No: 543 Space Drive Make sure

City,ST,ZIP: Houston TX 77099 SSNs correct

Frngn ctry,prov/state/county,postal code:

**Presidential** **Note:** Checking a box below won't change your tax or refund.

**Elec Campaign** Check if you/spouse want \$3 to go to fund ☐ You ☐ Spouse

**Filing Status** 1 ☒ Single 4 ☐ Head of hshld. If qual person a child but not your dependent, child's name:

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

3 ☐ Married filing separately

5 ☐ Qual widow w/dep child

one box. Spouse name

**Exemp- tions** 6a ☒ Yourself (but NOT if you can be someone's dependent)

b ☐ Spouse

c Dependents:

(1) First Last Name	(2) SSN	(3) Relationship	(4) # Children Crdt	# Lived w/ you	Apart - div	# Other

If > 4 dependents, check here ☐ d Total number of exemptions claimed Add nos. above 1

**MINI-WORKSHEET FOR LINE 7, WAGES**

a. Wages not on W-2 Self: Spouse:

b. Total from line a 0

**Note:** Line b includes spouse amounts only if you are married filing a joint return.

c. Wages from W-2's 19,400

d. Total for line 7 19,400

**Income** 7 Wages, etc 7 19,400

**Attach copy B** 8a Taxable interest income. (Sch B if required) 8a

b Tax-exempt interest 8b 0

9a Ordinary dividends 9a 0

b Qual divs 9b 0

**MINI-WORKSHEET FOR LINE 10, TAXABLE REFUNDS OF STATE AND LOCAL INCOME TAXES**

**Note:** This mini-worksheet requires certain information from your 2012 income tax return. If you did not create this tax return using last year's tax data, complete the Last Year's Data Worksheet before continuing.

a. Sum of "special case" amounts from Forms 1099-G (based on Pub. 525) a. 0

(If so, see IRS Pub. 525 and enter your taxable refunds manually on line 10.)

b. Amount of refunds (up to diff betw deds):

i. Refunds received (Form 1099-G) 0

Check to use amount on line i ☒

Check to calculate limit on taxable amt ☐

**Limitation on Taxable Amount**

**H&R Block load last year users who calculated (but did not use) sales tax deduction in 2012:**

1. Sales tax you could have deducted in 2012

Line 1 comes from the Last Year's Data Worksheet. We blank out lines 2 - 9 if line 1 is calculated.


**Others:**

2. 2012 number of exemptions

3. 2012 adjusted gross income

4. 2012 nontaxable income

5. 2012 total available income .....
6. 2012 states of residence:
- (1) 2012 state at year-end .....  
2012 locality .....  
2012 state general sales tax rate ..... %  
**CA and NV: Enter your 2012 combined state and local general sales tax rate on the following line.**  
2012 local general sales tax rate ..... %
- (2) 2012 other state .....  
2012 dates of residence in other state:  
From ..... to .....  
2012 locality .....  
2012 state general sales tax rate ..... %  
**CA and NV: Enter your 2012 combined state and local general sales tax rate on the following line.**  
2012 Local general sales tax rate ..... %
7. 2012 total from tables .....
8. 2012 sales tax for major purchases .....
9. 2012 state and local sales tax ded  
(line 7 + line 8) .....
10. 2012 state and local inc tax ded .....
11. Ln 10 minus Ln 9 (or line 1, if  
applicable) .....
12. Smaller of lines b(i) and 11 .....
- ii. Line b(i) or 12 ..... **b.** .....
- Note:** We carry line 12 to line b if you indicate that you want to calculate the difference between your 2012 income and sales tax deductions. Otherwise we carry line b(i) to line b.
- c. Itemized deductions allowed in 2012 ..... **c.** .....
- d. 2012 filing status ..... **d.** .....  
If line d is "3", "X" if itemizing ..... ☐
- e. 2012 minimum standard deduction ..... **e.** .....
- f. Number of boxes x'd on 2012 Form 1040,  
line 39a ..... **f.** .....
- g. Ln f x \$1150 (\$1450 if Ln d is 1 or 4) ..... **g.** .....
- h. Reserved ..... **h.** .....
- i. Reserved ..... **i.** .....
- j. 2012 standard deduction (Ln e + Ln g) ..... **j.** .....
- Note:** We blank line j if line d is X'd.
- k. Sum of lines h, i, and j ..... **k.** .....
- l. Line c - line k (not < 0) ..... **l.** .....
- m. Smaller of line b or line l ..... **m.** .....
- n. Sum of lines a and m (to line 10) ..... **n.** ..... 0

of W-2, W-2G, & 1099-R here.	10	Taxable refunds of state and local income taxes .....	10	0
	11	Alimony received .....	11	
	12	Business income or loss. Attach Sched C or C-EZ .....	12	0
	13	Capital gain/loss ..... <input type="checkbox"/>	13	0
	14	Other gains or losses. Attach Form 4797 .....	14	
	15a	IRA's ..... <b>15a</b> ..... <b>b</b> Taxbl	15b	0
	16a	Pension, annuities ..... <b>16a</b> ..... <b>b</b> Taxbl	16b	0
	17	Rent, royalty, partnership, S corp, trust (Sch E) .....	17	
	18	Farm income or loss. Attach Schedule F .....	18	0
	19	Unemploy compensation .....	19	
Adjusted	20a	Soc Sec benefits ..... <b>20a</b> ..... <b>b</b> Taxable ..	20b	
	21	Other income (type and amt) .....	21	0
	22	Combine lines 7 through 21. Your <b>total income</b> ..... 	22	19,400
	23	Educator expenses .....	23	
	24	Certain bus expenses of reservists, artists, fee-basis gov't officials .....	24	0
	25	Health insurance (attach Form 990-B)	25	

25	Health savings acct ded (Fm 8889) . . . . .	25	0
26	Moving exps (Form 3903) . . . . .	26	0
27	Deductible self-empl tax (Sch SE) . . . . .	27	0
28	SE SEP/SIMPLE/qualified plans. . . . .	28	0

**MINI-WORKSHEET FOR LINE 29, SELF-EMPLOYED  
HEALTH INSURANCE DEDUCTION**

- a. Total paid in 2013 for 2013 health insurance coverage established under your business (or the S corporation in which you were a more-than-2-percent shareholder) for you, your spouse, and your dependents. Your insurance can also cover your child who was under age 27 at the end of 2013, even if the child was not your dependent . . . . .

**Note:** Do not include amounts for any month you were eligible to participate in an employer-sponsored health plan (see instr.) or amounts paid from retirement plan distributions that were nontaxable because you are a retired public safety officer.

**Note:** See the IRS instructions if, during 2013, you were an eligible trade adjustment assistance (TAA) recipient, alternative TAA (ATAA) recipient, reemployment trade adjustment assistance (RTAA) recipient, Pension Benefit Guaranty Corporation pension recipient, or more-than-2-percent shareholder in an S corporation.

**Note:** Your personal services must have been a material income-producing factor in the business.

- b. Amount from Schedule K-1, line 13 . . . . . 0
- c. Line a plus line b . . . . . 0

- d. Check here if the business under which the insurance plan was established was an S corp., and you were a more-than-2% shareholder in the S corp. . . . . ☐

- e. Net profit and any other earned income from the business under which the insurance plan is established, less 1040 lines 27 and 28 . . . . . 0

**Note:** We calculate line e. for you in most cases. But note these special rules:

- If you have more than one source of self-employment income, or if you are filing Form 2555 or Form 2555-EZ, use the worksheet in IRS Publication 535 to figure your entry for line e.
- If you checked box d., enter your Medicare wages (box 5 of Form W-2) from the S corp. on line e. You may need to make additional adjustments on line e. if, in addition to the S corp, you have another health plan and source of self-employment.
- See the IRS instructions and override as necessary if you have Conservation Reserve Program payments that are exempt from self-employment tax.

- f. Smaller line c. or e. (for line 29) . . . . . 0
- g. Extra premiums included on line c. that were for nondependent children under age 27 for whom a medical expense deduction can't be claimed . . . . .

**Note:** You might need to adjust our calculations on line 1 of Schedule A if you had more than one source of income that could support the self-employed health insurance deduction and you paid additional premiums to cover a nondependent child.

29	Self-employed health ins deduction . . . . .	29	0
30	Penalty on early w/drawal of svgs . . . . .	30	0

31a Alimony pd . . . bRecip SSN 31a

**MINI-WORKSHEET FOR LINE 32,  
IRA DEDUCTION**

- a. Your IRA deduction . . . . .  
b. Your spouse's IRA deduction . . . . . 0  
c. Total (to line 32) . . . . . 0

Gross 32 IRA deduction (see instr) . . . . . 32 0

**MINI-WORKSHEET FOR LINE 33,  
STUDENT LOAN INTEREST DEDUCTION**

**Note:** *If you are claimed as a dependent on someone else's return, or if you are married filing a separate return, you are not eligible for this deduction.*

- a. Qualifying interest . . . . .  
b. Maximum interest deduction . . . . .  
c. Eligible interest. Smaller line a or b . . . . .  
d. Total income (Form 1040 line 22) . . . . .  
e. Total of amounts from Form 1040, lines 23 through 32, and amount to left of line 36 . . . . .  
f. Foreign earned income and housing deduction . . . . .  
g. Income excluded from Puerto Rico, Guam, American Samoa, or N. Mariana Islands . . . . .  
h. Modified AGI. Ln d - Ln e + Lns f and g . . . . .  
i. Phaseout threshold (\$60,000; \$125,000 jnt) . . . . .  
j. Line h - line i . . . . .  
k. Reduction amount (line c times line j divided by \$15,000 if not joint, \$30,000 joint) . . . . .  
l. Deduction (line c - line k). To line 33 . . . . .

Income 33 Student loan interest deduction . . . . . 33  
34 Tuition & fees. Attach Form 8917 . . . . . 34  
35 Dom. prod. act. ded. (Fm 8903) . . . . . 35 0  
36 Lns 23 - 35 . . . . . 36 0  
37 Line 22 - line 36. Your **adjusted gross income** . . . . . 37 19,400

KIA  
END OF PAGE 1

Not  
For  
Filing

Tax and 38 Amount on line 37 (adjusted gross income) 38 19,400

Credits 39a You born before Jan 2, 1949 Blind 39a 0  
Sp born before Jan 2, 1949 Blind

MINI-WORKSHEET FOR LINE 39b

a. Married, filing separately and spouse itemizes

b. Are you a dual-status alien

b Sp itemizes on sep rtn/dual-status alien 39b

MINI-WORKSHEET FOR LINE 40,  
STANDARD VS ITEMIZED DEDUCTION

a. Your standard deduction (calculated) 6,100

b. Itemized deductions (from Schedule A)

c. "X" if you are required to itemize (calculated)

d. "X" if you want to itemize, even if lower deduction

e. "X" if you are married filing separately and  
are taking the standard deduction (calculated)

f. Larger of a. and b. (or, if c or d is "X", then b;  
if e is "X", then a) Carry to line 40 6,100

40 Itemized deductions or standard deduction 40 6,100

Check here if you itemized

41 Subtract line 40 from line 38 41 13,300

MINI-WORKSHEET FOR PERSONAL EXEMPTIONS

a. Is amount on line 38 more than amount shown  
below on line d for your filing status?  
No. Stop. Multiply \$3,900 by line 6d and  
enter result on line 42.  
Yes. Continue.

b. Line 6d multiplied by \$3,900

c. Amount on Line 38

d. Ceiling amount  
Married filing jointly or  
Qualifying widow(er) 300,000  
Married filing separately 150,000  
Single 250,000  
Head of household 275,000

e. Line c minus line d

f. Is line e more than \$122,500 (\$61,250 if  
married filing separately)?  
Yes. Stop. Enter -0- on line 42.  
No. Divide line e by \$2,500 (\$1,250  
if married filing separately)

g. Line f multiplied by 2% (.02)  
Note: We limit line g to 1.00.

h. Line b multiplied by line g

i. Deduction for exemptions.  
Line b minus line h (to line 42)

42 Exemptions. If line 38 is \$150,000 or less, multiply  
\$3,900 by number on line 6d (see instructions) 42 3,900

43 Taxable income. Ln 41 minus 42 (not less than 0) 43 9,400

FOREIGN EARNED INCOME TAX WORKSHEET

a. Form 1040, line 43

b. Form 2555, line 45 and 50, or Form 2555-EZ,  
line 18

c. Lines a + b

d. Tax on line c

e. Tax on line b

f. Line d. minus line e. If zero or less, enter 0

44 Tax. See instr. Check if total includes tax from  
a 8814 b 4972 c 44 968

45 Alternative minimum tax. (Form 6251) 45 0

46 Add lines 44 and 45 46 968

**MINI-WORKSHEET FOR LINE 47,  
FOREIGN TAX CREDIT**

- a. Foreign tax credit from Form(s) 1099-DIV, 1099-INT, 1099-MISC, and Schedule(s) K-1 (partnerships/S corps) ..... 0  
**Note:** We blank line a if you use Form(s) 1116.
- b. Smaller of line a. and line 44 ..... 0
- c. Foreign tax credit from Form(s) 1116 ..... 0
- d. Line b + line c. To line 47 ..... 0

47	Foreign tax credit (1116 if req'd) .....	47	0	
48	Child care credit (Form 2441) .....	48		
49	Educ credits from Fm 8863, line 19 .....	49		
50	Retirement savings crdt (Fm 8880) .....	50	0	
51	Child tax credit .....	51		
<b>Note:</b> Attach Schedule 8812, if required.				
52	Residential energy crdts (Fm 5695) .....	52		
53	Other credits. Check: a <input type="checkbox"/> Fm 3800	53	0	
	b <input type="checkbox"/> 8801 c <input type="checkbox"/> Specify .....			
54	Add lines 47 through 53. Your <b>total credits</b> .....	54		0
55	Subtract line 54 from line 46 (not less than 0) .....	55		968
Other Taxes	56 Self-employment tax. (Sched SE) .....	56		0
	57 Unreported tax from: a <input type="checkbox"/> Fm 4137 b <input type="checkbox"/> Fm 8919	57		0
	58 Tax on IRAs, qualified plans, etc. (Form 5329) .....	58		0
	59a Household employment taxes from Schedule H .....	59a		0
	b First-time homebuyer credit repayment. Form 5405 .....	59b		0
	60 Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Form 8960	60		0
	c <input type="checkbox"/> Instructions; enter code .....			
61	Lns 55 to 60. <b>Total tax</b> .....	61		968

**MINI-WORKSHEET FOR LINE 62,  
FEDERAL TAX WITHHELD**

- a. Backup withholding (Bkgd Wks, 1099-DIV, 1099-INT/OID, 1099-MISC, K-1) ..... 0
- b. Oth fed inc tax w/h (W-2, W-2G, 1099-G, 1099-R, SSA-1099, RRB-1099) ..... 3,000
- c. Add'l Medicare tax withholding from Form 8959 ..... 0
- d. Total federal tax withheld (to line 62) ..... 3,000

Pay- ments	62	Federal income tax withheld .....	62	3,000	
	63	2013 est tax + amt from 12 return .....	63	0	
	64a	EIC .....	64a		
	b	Nontax combat pay ..... 64b			
	<b>Note:</b> Attach Schedule EIC if you have a qualifying child.				
	65	Add'l chld tax cr. Attach Sch 8812 .....	65		
	66	American opp crdt, Fm 8863, ln 8 .....	66		
	67	Reserved .....	67		
68	Amt pd with extension request .....	68			

**MINI-WORKSHEET FOR LINE 69,  
EXCESS SOC SEC AND RRTA**

(Fill in W-2's first; leave blank unless 2 or more employers.)

- a. "X" if more than 1 employer. Self: ☐ Spouse: ☐
- b. Eligible Soc Sec tax paid. Self: \_\_\_\_\_ Spouse: \_\_\_\_\_
- c. Eligible RRTA tax paid. Self: \_\_\_\_\_ Spouse: \_\_\_\_\_
- d. Sum of lines b and c. Self: 0 Spouse: \_\_\_\_\_
- e. If a="X", amount on line d minus \$7049.40 ..... Self: 0 Spouse: \_\_\_\_\_
- f. Total on line e. Carry to ln 69 .....TOTAL: 0

69	Excess Soc Sec & RRTA tax withheld .....	69	0	
70	Crdt for fed tax on fuels (F 4136) .....	70		

**MINI-WORKSHEET FOR LINE 71,  
MISCELLANEOUS CREDITS**

- a. Credits from Forms 2439, 8801 (line 27), or 8885 ..... 0
- b. Credit for repayment of amounts you included in

income in an earlier year because it appeared  
you had a right to the income .....

c. Total for line 71 ..... 0

71 Credits from: a ☐ 2439 b ☐ Reserved

c ☐ 8885 d ☐ ..... 71 0

72 Lines 62, 63, 64a, 65 - 71. Total payments ..... 72 3,000

Refund 73 If line 72 is larger than line 61, amt overpaid ..... 73 2,032

Direct 74a Amount of line 73 you want refunded to you.

Check if Form 8888 is attached: ☐ ..... 74a 2,032

deposit? b Routing number XXXXXXXXXX c Type: ☐ Checking ☐ Savings

See d Account number XXXXXXXXXXXXXXXXXXXX

instr. 75 Amt to apply to 2014 estimated tax ..... 75 0

Amount 76 Amount you owe (including Form 2210 penalty) ..... 76

Note: For details on how to pay, see IRS instr.

Payment Voucher, see IRS instructions.

You Owe 77 Amount of penalty on Form 2210 ..... 77

Desi- Allow another to discuss return with IRS? ☐ Yes. Complete following ☒ No

gnee Designee's name: Phone PIN

Note: If you are signing for your child, sign his or her name, and  
write "By" and then your name, and then, "parent for minor child."

Under penalties of perjury, I declare that I have examined this return and ac-  
companying schedules and statements, and to the best of my knowledge and bel-  
ief, they are true, correct, and complete. Declaration of preparer (other than  
taxpayer) is based on all information of which preparer has any knowledge.

Signature: Date Your occupation Day tel.

Sign here Spouse's sig (req'd if jt.) Date Spouse's occupation IP PIN

Keep a Preparer name Preparer signature Date Self- PTIN

copy for empl? ☐ your Firm's name Firm's EIN

records. Firm's address Ph

END OF FORM



## **SUPPORTING FORMS**

**RE:** 2013 Tax Returns

**PREPARED FOR:** Patty Bayan

**SSN:** 466-33-1234

**PRINTED ON:** November 25, 2013

**PREPARED USING:** H&R Block 2013 [2901]

### **SUPPORTING FORMS WHICH CAN BE SUBMITTED TO THE IRS**

#### **SUPPORTING FORMS IN YOUR RETURN**

1. - Background Worksheet - Background Information Worksheet
2. - Last Year's Data Worksheet - Last Year's Data Worksheet

\*\*\*\*\* DO NOT MAIL THIS PAGE \*\*\*\*\*

1. YOUR NAME, ADDRESS AND TELEPHONE NUMBER

Your name (first, MI, last, Jr/III) .....Patty..... Bayan.....

Spouse's name (first,MI,last,Jr/III) ..... ..

C/O information, if necessary .....  
☐ Foreign address (not APO/FPO)

Your street and apartment # (if any) .....543 Space Drive.....

Your city, state, and ZIP code .....Houston....., TX 77099.....

Foreign country ..... ..

Foreign province/state/county ..... ..

Foreign postal code ..... ..

Your telephone number (daytime) ..... ..  
☐ I live outside the U.S. and Puerto Rico and my main place of work is outside the U.S. and Puerto Rico, or I'm in military or naval service outside the U.S. and Puerto Rico.  
☐ Check here if you received a letter from the IRS with an identity protection personal identification number (IP PIN).  
IP PIN's are uncommon. They are sent to certain taxpayers taxpayers who have had a problem with identity theft.  
Taxpayer 6-digit IP PIN ..... ..  
Spouse 6-digit IP PIN ..... ..

2. GENERAL INFORMATION

	Yours	Your spouse's
a. Social Security number .....	466-33-1234	.....
b. Date of birth (MM/DD/YYYY) .....	1/1/1960	.....
c. "X" if legally blind .....	<input type="checkbox"/>	<input type="checkbox"/>
d. Enter "X" if disabled .....	<input type="checkbox"/>	<input type="checkbox"/>
e. Occupation .....	Parking Attendant	.....
f. "X" if you want \$3 to go to Pres. Elec. Campaign Fund .....	<input type="checkbox"/>	<input type="checkbox"/>

~~~~~

|                                                                           | Primary taxpayer         | Spouse                   |
|---------------------------------------------------------------------------|--------------------------|--------------------------|
| g. If this return is for a deceased person, enter the date of death ..... | .....                    | .....                    |
| h. Full-time student (see help panel for details) .....                   | <input type="checkbox"/> | <input type="checkbox"/> |

3. FILING STATUS

a. Choose your filing status below:  
☒ Single  
☐ Married filing joint return  
☐ Married filing separate return  
☐ Head of household  
☐ Qualifying widow(er)  
If you have not yet made an entry, we choose married filing a joint return. For more information, see the filing status section of the IRS instructions for Form 1040.

b. If you are married filing separately, check the applicable box.  
I want to itemize my deductions .....☒  
I want to use the standard deduction .....☐

c. Check the box if you are married filing separately **AND** you and your spouse lived apart throughout 2013 .....☒

d. If filing status is head of household, and qualifying person is a child but not your dependent, enter the child's name .....  
and SSN .....  
Click here to clear or make a new selection .....☐  
**Note:** Once you enter information on line d, we will carry that data into a copy of the Dependents Worksheet as a nondependent. To delete or edit this information, you'll need to delete or edit the copy of the Dependents Worksheet that applies to this person. If you determine this person is your dependent after completing the Dependent Worksheet, we'll set the above fields null.

e. If qualifying widow(er), enter the year your spouse died .....  
f. Dual-Status Alien: Enter "X" if you or your spouse is a dual-status alien **AND** you are NOT entering on this tax return your combined worldwide

**AND** you are NOT entering on this tax return your combined worldwide income. If you enter "X," your standard deduction is zero ..... ☐

**BACKGROUND INFO CONTINUED ON PAGE 2**

*END OF PAGE 1*

**BACKGROUND (CONT'D) PAGE 2**

**2013**

**Not  
For  
Filing**

4. EXEMPTIONS FOR YOU AND YOUR SPOUSE

- a. Place an "X" here if anyone else (a parent, e.g.) can claim you as a dependent on his or her tax return. (Joint filers enter "X" only if someone else can claim you, **AND** your tax before withholding is zero.) ☐
- b. Enter "Y" if you are entitled to an exemption for yourself ☒ Y  
(This is always "Y," unless the question above is "X.")
- c. If married, place an "X" here if anyone else (a parent, e.g.) can claim **your spouse** as an exemption on his or her tax return. (Joint filers enter "X" only if someone else can claim your spouse, **AND** your tax before withholding is zero.) ☐
- d. Enter "X" if you are entitled to an exemption for your spouse ☒ X  
(Married filing jointly or, in some cases, married filing separately or head of household. See IRS 1040/1040A instructions for details.)

Your Exemption for Alternative Minimum Tax

- |                                                                                                                                                                                          | YES                      | NO                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| e. You had at least one parent living on the last day of 2013<br>If you answered yes to the previous question and you were ages 18-23 on the last day of 2013, answer the next question. | <input type="checkbox"/> | <input type="checkbox"/> |
| f. Your earned income was less than half of your support in 2013                                                                                                                         | <input type="checkbox"/> | <input type="checkbox"/> |

5. TAXES PAID/WITHHELD

- a. Estimated taxes paid (do not include 2012 refund applied):

| Date | Amount |
|------|--------|
|      |        |
|      |        |
|      |        |
|      |        |
|      |        |
|      |        |
|      |        |

Total estimated tax payments 0

**Note:** If you and your spouse each filed separate extensions but are now filing a joint return, or if you jointly filed an extension but are now filing separate returns, see the IRS instructions to Form 4868 and adjust the amount on line b. accordingly.

- b. Amount paid with Form 4868 (for October returns)

MINI-WORKSHEET FOR LINE 5c

|                                            |   |
|--------------------------------------------|---|
| a. Withholding from imported Form 1099-B's | 0 |
| b. Withholding from other Form 1099-B's    |   |
| c. Total withholding on Form 1099-B        | 0 |

- c. Withholding on Form 1099-B 0
- d. Withholding on Form 1099-PATR

6. PAYING YOUR TAXES BY CREDIT CARD

- a. Confirmation number, if taxes are being paid by credit card.
- b. Amount charged to credit card (not including convenience fee), if taxes are being paid by credit card

7. REFUND INFORMATION

Direct Deposit

Would you like to speed your refund by having the IRS deposit it directly into your account at a bank or other financial institution in the United States? If so, fill in the following regarding the account and place an X here ☐

- 1a. Routing Transit Number ("RTN")
- b. Depositor Account Number ("DAN")

**Note:** Here is a sample of the numbers you might find at the bottom of a check, with "RTN," "DAN," and check number identified.

|           |          |               |
|-----------|----------|---------------|
| RTN:      | DAN:     | Check number: |
| 123404567 | 123-4567 | 0101          |

- c. Type of account:
- ☒ Checking ☐ Savings

- d. Amount to be deposited in first account ..... \_\_\_\_\_
- 2a. Routing Transit Number ("RTN") ..... \_\_\_\_\_
- b. Depositor Account Number ("DAN") ..... \_\_\_\_\_
- c. Type of account:  
☒ Checking ☐ Savings
- d. Amount to be deposited in second account ..... \_\_\_\_\_
- 3a. Routing Transit Number ("RTN") ..... \_\_\_\_\_
- b. Depositor Account Number ("DAN") ..... \_\_\_\_\_
- c. Type of account:  
☒ Checking ☐ Savings
- d. Amount to be deposited in third account ..... \_\_\_\_\_

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**Applying Refund to Your 2014 Estimated Tax**

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If you are due a refund this year, do you want to apply any of it to 2014  
estimated tax? If so, please enter the amount here \_\_\_\_\_

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**BACKGROUND INFO CONTINUED ON PAGE 3**

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*END OF PAGE 2*

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8. THIRD PARTY DESIGNEE

Do you want to allow another person to discuss this return with the IRS?    ☐ **Yes**    ☒ **No**

*If Yes, complete the following information:*

Designee's name: \_\_\_\_\_

Designee's phone number: \_\_\_\_\_

Designee's personal identification number (PIN): \_\_\_\_\_

9. RETURN ASSISTANCE

How was this return prepared:

☒ By yourself.

☐ With help of an IRS-sponsored program (if so, enter one of the following: TC, TCE, TC-X, TCE-X, VITA, VITA-T, Self-Help, IRS-Prepared, IRS-Reviewed, Outreach): \_\_\_\_\_

10. STATE TAX RETURNS

Enter information below about any 2013 state tax returns you're filing.  
For each state, select the residency status that applies for 2013.

| Name of state(s) | Your residency status | Spouse's residency status |
|------------------|-----------------------|---------------------------|
| _____            | _____                 | _____                     |
| _____            | _____                 | _____                     |
| _____            | _____                 | _____                     |

Use this Worksheet to enter information from your 2012 tax return for use in our calculations.

2012 Form 1040, 1040A or 1040EZ

1a Filing status:

☒ Single

☐ Married filing joint return

☐ Married filing separate return

☐ Head of household

☐ Qualifying widow(er)

Spouse's Social Security number

If you and your spouse filed separate returns last year, check the box if your spouse itemized deductions

1b Form filed:

Eligible for:

☒ Form 1040

☒ Form 1040A

☒ Form 1040EZ

Filed:

☐ Form 1040

☐ Form 1040A

☒ Form 1040EZ

2 Number of exemptions (1040 line 6, 1040A line 6)

3 Number of additional deductions (1040 line 39a, 1040A line 23a)

Note: Your entry on line 2 must be between 0 and 4.

4 Adjusted gross income (1040 line 37, 1040A ln 21, 1040EZ ln 4)

5 Itemized deductions (1040, above line 40)

6 Tax less certain credits (1040 line 55, 1040A line 35, 1040EZ line 10)

7 Self-employment tax (1040 line 56)

8 Alternative minimum tax (1040 line 45, 1040A line 28 write-in)

9a Household employment tax (1040 line 59a)

9b Homebuyer credit repayment, Form 5405, line 8 (1040 line 59b)

10 Earned income credit (1040 ln 64a, 1040A ln 38a, 1040EZ ln 8a)

11 Refund applied to 2013 (1040 line 75, 1040A line 44)

12 Interest on tax due on installment income from lots/timeshares

13 Interest on deferred tax on gain from certain installment sales with sales price over \$150,000

14 Tax on income received from nonqualified deferred compensation plan that fails to meet requirements

2012 Schedule D

15 Used Schedule D Tax Worksheet

16 Line 6 of Qualified Dividends and Capital Gain Tax Worksheet or line 13 of Schedule D Tax Worksheet

17 Line 19 of Schedule D

18 Line 10 of Schedule D Tax Worksheet

19 Line 7 of Qualified Dividends and Capital Gain Tax Worksheet or line 14 of Schedule D Tax Worksheet

Note: Enter the amounts on lines 20 and 21 as positive numbers.

20 Short-term capital loss carryforward (line 8 of Capital Loss Carryover Worksheet in 2013 Schedule D instructions)

21 Long-term capital loss carryforward (line 13 of Capital Loss Carryover Worksheet in 2013 Schedule D instructions)

2012 Form 2555

Note: Lines 22 - 25 are for the housing deduction carryover.

22 Line 46 (yours)

23 Line 48 (yours)

24 Line 46 (spouse's)

25 Line 48 (spouse's)

2012 Form 4136

26 Total fuel tax credit (line 17)

2012 Form 4952

27 Disallowed investment interest expense (line 7)

28 Disallowed investment interest expense (AMT) (line 7) .....

**2012 Form 5329**

29 Tax on early distribution (line 4) (yours) .....

30 Tax on early distribution (line 4) (spouse's) .....

31 Tax on distribution from education account (line 8) (yours) .....

32 Tax on distribution from education account (line 8) (spouse's) .....

**2012 Form 5405**

33 **2012** Homebuyer credit re-payment .....

**2012 Form 5695**

34 Residential energy efficient property cr carryforward (line 18) .....

**2012 Form 6251**

35 Adjusted gross income minus itemized deductions (line 1) .....

36 Medical and dental expenses (line 2) .....

37 Taxes from Schedule A if you itemize (line 3) .....

38 Certain interest on a home mortgage (line 4) .....

39 Miscellaneous deductions (line 5) .....

40 Amount from line 6 (enter as negative) .....

41 Tax refund from Form 1040 (line 7; enter as negative) .....

42 Investment interest expense (reg. - AMT) (line 8) .....

43 Depletion differences (line 9) .....

44 Net operating loss (line 10; enter as positive) .....

45 Interest from specified private activity bonds (line 12) .....

46 Qualified small business stock (line 13) .....

47 Regular tax minus 4972 amount and foreign tax credit (line 34) .....

**LAST YEAR'S DATA (CONT'D) PAGE 3**

**2013**

Patty Bayan SSN: 466-33-1234

**2012 Form 8801**

48 Prior Year AMT less AMT (Line 18) .....

49 Fuel credit (Line 20) .....

50 Allowable minimum tax credit (line 25) .....

51 Minimum tax credit carryforward (line 28) .....

52 Line 57 of 2010 return (line 57) .....

**2012 Form 8812**

53 Additional child tax credit (line 13) .....

**2012 Form 8859**

54 DC first-time homebuyer credit carryforward (line 4) .....

**2012 Form 8885**

55 Health insurance credit (yours) .....

56 Health insurance credit (spouse's) .....

**Miscellaneous 2012 Taxes**

57 Recapture of investment credit .....

58 Recapture of low-income housing credit .....

59 Recapture of qualified electric veh credit .....

60 Recapture of Indian employment credit .....

61 Recapture of new markets credit .....

62 Section 72(m)(5) excess benefits tax .....

63 Tax on excess parachute payments .....

64 Tax on accumulation distribution of trusts .....

65 Tax on medical savings account distributions .....

66 Recapture of employer-provided childcare facilities .....

67 Tax on health savings account distributions .....

68 Tax on Medicare Advantage MSA distributions .....

69 Recapture of alternative motor vehicle credit .....

70 Recapture of alternative fuel vehicle refueling property credit .....

71 Recapture of health coverage tax credit advance payment .....

72 Certain tax on Sec. 457A deferred compensation .....

73 Tax for failure to maintain HDHP coverage .....



|                                                                                                 |                                                                 |       |
|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|-------|
| 74                                                                                              | Recap of charitable deduction for fractional tang pers prop int | _____ |
| <b>Note:</b> Lines 75 - 79 are for determining whether your state income tax refund is taxable. |                                                                 |       |
| 75                                                                                              | <input type="checkbox"/> Income taxes deducted                  |       |
|                                                                                                 | <input type="checkbox"/> General sales taxes deducted           |       |
| 76                                                                                              | <input type="checkbox"/> Sales tax calculated                   |       |
| 77                                                                                              | State or local income tax deducted                              | _____ |
| 78                                                                                              | Sales tax you could have deducted                               | _____ |
| 79                                                                                              | Sales tax on major purchases                                    | _____ |

**Electronic Filing Information**

|    |                                               |       |
|----|-----------------------------------------------|-------|
| 80 | Personal Identification Number (PIN)          | _____ |
|    | Spouse's Personal Identification Number (PIN) | _____ |

**Amounts Needed for Form 2210**

|    |                                                                 |       |
|----|-----------------------------------------------------------------|-------|
| 81 | Refundable Part of the American Opportunity Credit (F8863, L14) | _____ |
| 82 | Adoption Credit                                                 | _____ |
| 83 | Credit Determined Under Section 1341(a)(5)(B)                   | _____ |

Is this W-2 for: ☒ Yourself ☐ Your spouse

**Note:** If your Form W-2 is marked "Void," do not enter it in here.  
You should contact your employer to receive a corrected Form W-2.

☐ Check here if you received a W-2c correcting this W-2.

a. Employee's SSN: 466-33-1234 Void ☐

☐ Do NOT carry SSN from Background Wkst

**Note:** We do not carry ITINs from the Background Worksheet. You need to manually enter the Social Security number shown in box a of this W-2.

|                                                                                                                    |                                                                                                                                                                                           |                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| b. Employer ID No.                                                                                                 | 1. Wages, etc.<br>19,400                                                                                                                                                                  | 2. Fed Tax WH<br>3,000                                                                                                                                    |
|                                                                                                                    | 3. Soc Sec Wages                                                                                                                                                                          | 4. SocSec Tax WH                                                                                                                                          |
|                                                                                                                    | 5. Med. Wages                                                                                                                                                                             | 6. Med. Tax WH                                                                                                                                            |
| c. Employer/payer name, address, and zip code:<br>Name1:<br>Name2:<br>Street:<br>City:<br>State: ZIP:              | 7. Soc Sec Tips                                                                                                                                                                           | 8. Alloc. tips                                                                                                                                            |
|                                                                                                                    | <input type="checkbox"/> Check if foreign address.                                                                                                                                        |                                                                                                                                                           |
|                                                                                                                    | <b>Note:</b> See help panel for special data entry instructions.                                                                                                                          |                                                                                                                                                           |
| d. Control Number                                                                                                  | 9.                                                                                                                                                                                        | 10. Depndnt Care                                                                                                                                          |
| e. Employee's name (1st,Mi,last,Jr)<br>Patty<br>Bayan<br><input type="checkbox"/> Do NOT carry name from Bkgd Wkst | 11. Nonqual plans                                                                                                                                                                         | 12. See instrns. Code Amt.                                                                                                                                |
|                                                                                                                    | f. Employee's address and ZIP code<br>Add1: 543 Space Drive<br>Add2:<br>Apt No.<br>Town/City Houston<br>State & ZIP TX 77099<br><input type="checkbox"/> Do NOT carry addr from Bkgd Wkst | 13. Statutory employee .. <input type="checkbox"/><br>Retirement plan ..... <input type="checkbox"/><br>Third party sick pay ... <input type="checkbox"/> |

**Note:** To e-file your address and your employer's address must be entered exactly as it appears on the W-2.

14. Other Description Other Amt.

| 15. State | Employer State Tax ID # | 16. State Wages | 17. State Tax | 18. Local Wages | 19. Local Tax | 20. Locality Name |
|-----------|-------------------------|-----------------|---------------|-----------------|---------------|-------------------|
|           |                         |                 |               |                 |               |                   |
|           |                         |                 |               |                 |               |                   |
|           |                         |                 |               |                 |               |                   |

ADDITIONAL INFORMATION FOR BOX 8 (TIPS) TO CARRY TO FORM 4137

1. If you have records of all unreported tips you received in 2013, and you want to use that amount instead of Box 8, check "Enter my own tips."  
☐ Use box 8  
☐ Enter my own tips

2. Cash and charge tips equal to \$20 or more in a calendar month received but not reported to your employer

3. Cash and charge tips received but not reported to your employer because the total was less than \$20 in a calendar month

**Note:** The \$20 per month limitation on lines 2 and 3 applies separately to each employer.

Not  
For  
Filing

**ADDITIONAL INFORMATION FOR BOX 10 (DEPENDENT CARE BENEFITS)**

If an amount appears in box 10 above, check the box that applies.

The benefits were for:

1. A care provider you hired and paid ☐
2. A care provider hired and paid by your employer ☐
3. On-site care provided by your employer ☐

Did you contribute to a flexible spending account during 2013?

☐ Yes  
☐ No

**ADDITIONAL INFORMATION FOR BOX 11 (NONQUALIFIED/457(B) PLAN DISTRIBUTIONS)**

- a. Check this box if you received a distribution from a nonqualified plan or nongovernmental Section 457(b) plan ☐
- b. Is the amount in box 11 above a distribution from a nonqualified plan or nongovernmental Section 457(b) plan?

☐ Yes  
☐ No

- If Yes, we carry the amount from box 11 to line c below.
- If No, enter the distribution amount received from your nonqualified plan or nongovernmental 457(b) plan \_\_\_\_\_
- c. Distribution amount received from your nonqualified plan or nongovernmental 457(b) plan (from box 11 of W-2 or line b above) \_\_\_\_\_

**ADDITIONAL INFORMATION FOR BOX 12 (CODE P)**

If you have a box 12 Code P amount, you received employer-provided relocation benefits. If you moved only once, you will not need to make an additional entry. We'll carry that amount to copy 1 of Form 3903 when you check the box below.

Box 12 amounts with Code P \_\_\_\_\_

If you moved more than once, check the box and assign the box 12 amount to the copy of Form 3903 corresponding to the move for which these benefits were paid (for example, copy 2 for your 2nd move, copy 3 for your 3rd, etc.).

Number of copies of Form 3903 (moves) presently in your return \_\_\_\_\_ 0

Check here to assign to Form 3903 ☐ Form 3903 Copy # \_\_\_\_\_ 1

**ADDITIONAL INFORMATION FOR BOX 13 (STATUTORY EMPLOYEES)**

If the Statutory Employee box in box 13 is checked, we do not carry your box 1 wages to line 7 of Form 1040. Instead, we carry these wages to the Schedule C you designate here \_\_\_\_\_

**ADDITIONAL MISCELLANEOUS INFORMATION**

- ☐ **Non-standard W-2.** Check here if this W-2 is handwritten, looks like it was prepared on a typewriter, or appears to be altered in any way.
- ☐ **Minister/Religious Employee.** Check this box if you are a minister or religious employee with no Social Security and Medicare tax withheld on your W-2.

KIA