

COVER PAGE

Filing Checklist for 2016 Tax Return Filed On Standard Forms

Prepared on: 12/12/2016 07:32:45 am

Return: C:\Users\Smokey\Desktop\Tax\2016 Whittenburg\Chapter 5\Bea Jones 2016 Tax Return.T16

To file your 2016 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

- Schedule A
- Schedule B
- Form 4684

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 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
- Last Year's Data Worksheet
- Form 1099-INT/OID
- Home Mortgage Interest Worksheet
- Health Care Coverage
- Health Care Summary

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		\$51,790
Adjustments	-	\$0
Adjusted gross income		\$51,790
Deductions	-	\$17,898
Exemption(s)	-	\$4,050
Taxable income		\$29,842

Tax withheld or paid already		\$7,800
Actual tax due	-	\$4,010
Refund applied to next year		\$8

Refund

\$3,790

For the year Jan. 1–Dec. 31, 2016, or other tax year beginning , 2016, ending , 20 See separate instructions.

Your first name and initial Last name Your social security number
Bea Jones 466–78–7359

If a joint return, spouse's first name and initial Last name Spouse's social security number

Home address (number and street). If you have a foreign address, see instructions. Home address (number and street) and on line 6c are correct.
654 Ocean Way

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Presidential Election Campaign
Gulfport FL 33707 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

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

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.

Exemptions 6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a } Boxes checked on 6a and 6b 1
b ☐ Spouse } No. of children on 6c who:
c Dependents: • lived with you
(1) First name Last name social security number (2) Dependent's relationship to you (3) Child under age 17 qualifying for child tax credit (see instructions) • did not live with you due to divorce (see instructions)

If more than four dependents, see instructions and check here ☐ Dependents on 6c not entered above 1
d Total number of exemptions claimed 1

Income 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 42,175
8a Taxable interest. Attach Schedule B if required 8a 2,175
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 7,440
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 0
15a IRA distributions 15a 0 b Taxable amount 15b 0
16a Pensions and annuities 16a 0 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 0
20a Social security benefits 20a 0 b Taxable amount 20b 0
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 51,790

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 0
30 Penalty on early withdrawal of savings 30 0
31a Alimony paid b Recipient's SSN 31a 0
32 IRA deduction 32 0
33 Student loan interest deduction 33 0
34 Tuition and fees. Attach Form 8879 34 0
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 51,790

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	51,790
39a	Check <input type="checkbox"/> You were born before January 2, 1952, <input type="checkbox"/> Blind. if: <input type="checkbox"/> Spouse was born before January 2, 1952, <input type="checkbox"/> Blind. Total boxes checked 39a <input type="checkbox"/> 0		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here 39b <input type="checkbox"/>		
40	Itemized deductions (from Schedule A) or your standard deduction (see instructions)	40	17,898
41	Subtract line 40 from line 38	41	33,892
42	Charitable contributions (see instructions). If line 42 is more than line 41, enter -0-	42	4,050
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	29,842
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	4,010
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	4,010
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	4,010

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	
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	4,010

Payments

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax withheld from Forms W-2 and 1099	64	7,800
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 <input type="checkbox"/>		
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	Excess social security and tier 1 RRTA tax withheld	70	0
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	7,800

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	3,790
76a	Amount of line 75 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	76a	3,790
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)

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

Paid Preparer Use Only

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

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

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on Form 1040

Bea Jones

Itemized Deductions

► Information about Schedule A and its separate instructions is at www.irs.gov/schedulea.

► Attach to Form 1040.

OMB No. 1545-0074

2016
Attachment
Sequence No. **07**

Your social security number
466-78-7359

**Medical
and
Dental
Expenses**

Caution. Do not include expenses reimbursed or paid by others.

Final form will be available through a program update.

1 Enter amount from Form 1040, line 38 2 51,790
3 Multiply line 2 by 10% (10.10). But if either you or your spouse was born before January 2, 1952, multiply line 2 by 7.5% (0.075) instead 3 5,179

4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- 4 1,355

**Taxes You
Paid**

5 State and local (check only one box):

a. ☐ Income taxes, or

b. ☒ General sales taxes

5 820

6 Real estate taxes (see instructions) 6 3,233

7 Personal property taxes 7 0

8 Other taxes. List type and amount ► 8 0

9 Add lines 5 through 8 9 4,053

**Interest
You Paid**

10 Home mortgage interest and points reported to you on Form 1098 10 8,780

11 Other mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ► 11 0

12 Points not reported to you on Form 1098. See instructions for special rules 12 0

13 Mortgage insurance premiums (see instructions) 13 0

14 Investment interest. Attach Form 4952 if required. (See instructions.) 14 0

15 Add lines 10 through 14 15 8,780

**Gifts to
Charity**

If you made a gift and got a benefit for it, see instructions.

16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions 16 0

17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 and a copy of the appraisal. 17 0

18 Carryover from prior year 18 0

19 Add lines 16 through 18 19 0

**Casualty and
Theft Losses**

20 Casualty or theft loss(es). Attach Form 4684. (See instructions.) 20 2,421

**Job Expenses
and Certain
Miscellaneous
Deductions**

21 Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►

Job-hunting expenses 925

Union dues 800

21 1,725

22 Tax preparation fees 22 600

23 Other expenses—investment, safe deposit box, etc. List type and amount ► 23 0

24 Add lines 21 through 23 24 2,325

25 Enter amount from Form 1040, line 38 25 51,790

26 Multiply line 25 by 2% (0.02) 26 1,036

27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0- 27 1,289

**Other
Miscellaneous
Deductions**

28 Other—from list in instructions. List type and amount ► 28 0

**Total
Itemized
Deductions**

29 Is Form 1040, line 38, over \$5,650? 29 17,898

☒ No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40.

☐ Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.

30 If you elect to itemize deductions even though they are less than your standard deduction, check here ► ☐

SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on return

Bea

Jones

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

2016

Attachment
Sequence No. **08**

Your social security number
466-78-7359

Part I
Interest

- 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.
- Beach National Bank

(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.

DRAFT FORM -- DO NOT FILE.

Final form will be available through a program update.

Amount

2,175

1

DRAFT FORM -- DO NOT FILE.

Final form will be available through a program update.

- 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 ▶

Note: If line 4 is over \$1,500, you must complete Part III.

Amount

2,175

4

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 ▶

DRAFT FORM -- DO NOT FILE.

Final form will be available through a program update.

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

6

0

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 instruction
- If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Assets (FBAR), to your financial institution, or are you required to file 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
	X
	X

DRAFT FORM -- DO NOT FILE.

Final form will be available through a program update.

Form **4684**Department of the Treasury
Internal Revenue Service**Casualties and Thefts**► Information about Form 4684 and its separate instructions is at www.irs.gov/form4684.

► Attach to your tax return.

► Use a separate Form 4684 for each casualty or theft.

OMB No. 1545-0177

2016Attachment
Sequence No. **26**

Name(s) shown on tax return

Bea

Jones

Identifying number

466-78-7359

SECTION A—Personal Use Property (Use this section to report casualties and thefts of property not used in a trade or business or for income-producing purposes.)

- 1 Description of properties (show type, location, and date acquired for each property). Use a separate line for each property lost or damaged from the same casualty or theft.

Property A Diamond ring

Personal residence 7/01/04

Property B

Property C

Property D

Properties

		A	B	C	D
2	Cost or other basis of each property	7,700			
3	Insurance or other reimbursement (whether or not you filed a claim) (see instructions)				
4	Gain from casualty or theft. If line 3 is more than line 2, enter the difference here and skip lines 5 through 9 for that column. See instructions if line 3 includes insurance or other reimbursement, but you claim no payment you received payment for your loss in a later tax year				
5	Fair market value before casualty or theft	11,000			
6	Fair market value after casualty or theft	0			
7	Subtract line 6 from line 5	11,000	0	0	0
8	Enter the smaller of line 2 or line 7	7,700	0	0	0
9	Subtract line 3 from line 8. If zero or less, enter -0-	7,700	0	0	0
10	Casualty or theft loss. Add the amounts on line 9 in columns A through D				7,700
11	Enter the smaller of line 10 or \$100				100
12	Subtract line 11 from line 10				7,600
13	Add the amounts on line 12 of all Forms 4684				7,600
14	Add the amounts on line 4 of all Forms 4684				0
15	• If line 14 is more than line 13, enter the difference here and on Schedule D. Do not complete the rest of this section (see instructions). • If line 14 is less than line 13, enter -0- here and on line 16. • If line 14 is equal to line 13, enter -0- here. Do not complete the rest of this section.				0
16	If line 14 is less than line 13, enter the difference				7,600
17	Enter 10% of your adjusted gross income from Form 1040, line 38, or Form 1040NR, line 37. Estates and trusts, see instructions				5,179
18	Subtract line 17 from line 16. If zero or less, enter -0-. Also enter the result on Schedule A (Form 1040), line 20, or Form 1040NR, Schedule A, line 6. Estates and trusts, enter the results on the "Other deductions" line of your tax return				2,421

KIA For Paperwork Reduction Act Notice, see instructions.

Form **4684** (2016)**DRAFT FORM -- DO NOT FILE.****Final form will be available through a program update.**

Name(s) shown on tax return. Do not enter name and identifying number if shown on first page of this form.

Bea Jones

Identifying number
466-78-7359**SECTION B—Business and Income-Producing Property****Part I Casualty or Theft Gain or Loss** (Use a separate Part I for each casualty or theft.)

19 Description of properties (show type, location, and date acquired for each property). Use a separate line for each property lost or damaged from the same casualty or theft. See instructions for claiming a loss due to a Ponzi-type investment scheme. **Section C is not completed.**

Property A

Property B

Property C

Property D

Final form will be available through a program update.

		Properties			
		A	B	C	D
20	Cost or adjusted basis of each property	20			
21	Insurance or other reimbursement (whether or not you filed a claim). See the instructions for line 3	21			
Note: If line 20 is more than line 21, skip line 22.					
22	Gain from casualty or theft. If line 21 is more than line 20, enter the difference here and on line 29 or line 34, column (c), except as provided in the instructions for line 33. Also, skip lines 23 through 27 for that column. See the instructions for line 4 if line 21 includes insurance or other reimbursement you did not claim, or you received payment for your loss in a later tax year	22		0	0
23	Fair market value before casualty or theft	23			
24	Fair market value after casualty or theft	24			
25	Subtract line 24 from line 23	25	0	0	0
26	Enter the smaller of line 20 or line 25	26	0	0	0
Note: If the property was totally destroyed by casualty or lost from theft, enter on line 26 the amount from line 20.					
27	Subtract line 21 from line 26. If zero or less, enter -0-	27	0	0	0
28	Casualty or theft loss. Add the amounts on line 27. Enter the total here and on line 29 or line 34 (see instructions).	28			0

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

Part II Summary of Gains and Losses (from separate Parts I)		(b) Losses from casualties or thefts		(c) Gains from casualties or thefts includible in income
(a) Identify casualty or theft		(i) Trade, business, rental or royalty property	(ii) Income-producing and employee property	

Casualty or Theft of Property Held One Year or Less

29		(0)	(0)	0
30	Totals. Add the amounts on line 29	30	(0)	0
31	Combine line 30, column (b)(i) and (b)(ii). Enter the net gain or loss here and on line 32 or line 39. For Form 4684, not otherwise required, see instructions	31		0
32	Enter the amount from line 30, column (b)(ii) here. Individuals, enter the amount from income-producing property on Schedule A (Form 1040), line 28, or Form 1040NR, Schedule A, line 14, and enter the amount from property used as an employee on Schedule A (Form 1040), line 23, or Form 1040NR, Schedule A, line 9. Estates and trusts, partnerships, and S corporations, see instructions	32		0

DRAFT FORM -- DO NOT FILE.**Final form will be available through a program update.****Casualty or Theft of Property Held More Than One Year**

33	Casualty or theft gains from Form 4797, line 32	33		0
34		(0)	(0)	0
35	Total losses. Add amounts on line 34, columns (b)(i) and (b)(ii)	35	(0)	0
36	Total gains. Add lines 33 and 34, column (c)	36		0
37	Add amounts on line 35, columns (b)(i) and (b)(ii)	37		0
38	If the loss on line 37 is more than the gain on line 36:			
a	Combine line 35, column (b)(i) and line 36, and enter the net gain or (loss) here. Partnerships (except electing large partnerships) and S corporations, see the note below. All others, enter this amount on Form 4797, line 14. If Form 4797 is not otherwise required, see instructions	38a		0
b	Enter the amount from line 35, column (b)(ii) here. Individuals, enter the amount from income-producing property on Schedule A (Form 1040), line 28, or Form 1040NR, Schedule A, line 14, and enter the amount from property used as an employee on Schedule A (Form 1040), line 23, or Form 1040NR, Schedule A, line 9. Estates and trusts, partnerships, and S corporations, see the note below. For Form 4684, not otherwise required, see instructions	38b		0
39	If the loss on line 37 is less than or equal to the gain on line 36, combine lines 36 and 37 and enter here. Partnerships (except electing large partnerships), see the note below. All others, enter this amount on Form 4797, line 3	39		0
Note: Partnerships, enter the amount from line 38a, 38b, or line 39 on Form 1065, Schedule K, line 11. S corporations, enter the amount from line 38a or 38b on Form 1120S, Schedule K, line 10.				

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

Name(s) shown on tax return.

Bea

Jones

Identifying number

466-78-7359

SECTION C—Theft Loss Deduction for Ponzi-Type Investment Scheme Using the Procedures in Revenue Procedure 2009-20 (Complete this section in lieu of Appendix A in Revenue Procedure 2009-20. See instructions.)**Part I Computation of Deduction**

40	Initial investment	40		
41	Subsequent investments (see instructions)	41		
42	Income reported on your tax returns for tax years prior to the discovery year (see instructions)	42		
43	Add lines 40, 41, and 42	43		0
44	Withdrawals for all years (see instructions)	44		
45	Subtract line 44 from line 43. This is your total qualified investment	45		0
46	Enter .95 (95%) if you have no potential third-party recovery. Enter .75 (75%) if you have potential third-party recovery	46		
47	Multiply line 46 by line 45	47		0
48	Actual recovery	48		
49	Potential insurance/Securities Investor Protection Corporation (SIPC) recovery	49		
50	Add lines 48 and 49. This is your total recovery.	50		0
51	Subtract line 50 from line 47. This is your deductible theft loss. Include this amount on line 28 of Section B, Part I. Do not complete lines 19-27 for this loss. Then complete Section B, Part II.	51		0

Part II Required Statements and Declarations (See instructions.)

- I am claiming a theft loss deduction pursuant to Revenue Procedure 2009-20 for a theft loss that is a qualified investment arrangement controlled by the taxpayer, individual or entity.
Name of individual or entity _____
Taxpayer identification number (if known) _____
Address _____
- I have written documentation to support the amounts reported in Part I of this Section C.
- I am a qualified investor as defined in section 4.03 of Revenue Procedure 2009-20.
- If I have determined the amount of my theft loss deduction using .95 on line 46 above, I declare that I have not pursued and do not intend to pursue any potential third-party recovery, as that term is defined in section 4.10 of Revenue Procedure 2009-20.
- I agree to comply with the conditions and agreements set forth in Revenue Procedure 2009-20 and this Section C.
- If I have already filed a return or amended return that does not satisfy the conditions in section 6.02 of Revenue Procedure 2009-20, I agree to all adjustments or actions that are necessary to comply with those conditions. The tax year(s) for which I filed the return(s) or amended return(s) and the date(s) on which they were filed are as follows:

KIA

Form 4684 (2016)