

Federal Information Worksheet

► Keep for your records

2014

Part I – Personal Information

Taxpayer:

Last name Bonney
 First name William
 Middle initial H Suffix _____
 Social security no. 123-45-4321
 Occupation Editor
 Date of birth 07/18/1972 (mm/dd/yyyy)
 Date of birth _____
 Age as of 1-1-2015 42
 Date of death _____
 Legally blind ☐
 E-mail address _____
 Work phone _____ Ext _____
 Note: Work phone is transmitted for electronic funds withdrawal
 Cell phone _____
 Home phone _____
 Fax number _____

Spouse:

Last name (if different) _____
 First name Paulita
 Middle initial T Suffix _____
 Social security no. 123-45-6789
 Occupation Sales
 Date of birth 09/18/1972 (mm/dd/yyyy)
 Age as of 1-1-2015 42
 Date of death _____
 Legally blind ☐
 E-mail address _____
 Work phone _____ Ext _____
 Cell phone _____

Best contact phone number _____
 Print phone number on Form 1040 _____ Home ☐ Taxpayer work ☐ Spouse work ☐
 Address 123 Water Street Apt no. _____
 City Saint Michaels State MD ZIP code 21663
 Foreign province/county _____ Foreign postal code _____
 Foreign code _____ Foreign country _____
 Foreign phone _____

APO/FPO/DPO address ☐ APO ☐ FPO ☐ DPO

Everyone on the return was covered by health insurance all year ☒ Yes ☐ No / Partial ☐ 1095 Worksheet _____

Part II – Federal Filing Status

- ☐ 1 Single
☒ 2 Married filing jointly
☐ 3 Married filing separately
☐ Taxpayer did **not** live with spouse at any time during year
☐ Taxpayer eligible to claim spouse's exemption (see Help)
☐ 4 Head of household
 If qualifying person is child but not dependent:
 Child's First name _____ MI _____ Last Name _____ Suff _____
 Child's social security number _____
☐ 5 Qualifying widow(er)
 Year spouse died ☐ 2012 ☐ 2013

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

First name	MI	Social security number	Date of birth (mm/dd/yyyy)	E I C	Lived with taxpyr in U.S.	Educ Tuition and Fees	Qualified child and dependent care expenses incurred and paid in 2014	Not qual for child tax credit Or non U.S.***
Last name	Suff	*Relationship					Code	
Henry Bonney		111-11-1237 Son	11/03/2004			<input type="checkbox"/>	L	
Rosella Bonney		111-11-1238 Daughter	05/16/2006			<input type="checkbox"/>	L	
						<input type="checkbox"/>		
						<input type="checkbox"/>		

* **Caution:** If claiming child other than taxpayer's see **Relationship** in Help

22222 Void D 123 45 6789		For Official Use Only ... OMB No. 1546--0008			
b Employer identification number (EIN) 52-1212121		1 Wages, tips, other compensation 36117.17		2 Federal income tax withheld 4035.59	
c Employer's name, address, and ZIP code Pete's Antiques 123 Main St St. Michaels, MD 21663		3 Social security wages 53617.17		4 Social security tax withheld 3324.26	
		5 Medicare wages and tips 53617.17		6 Medicare tax withheld 777.45	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial Paulita T. 168 Water Street St. Michaels, MD 21663		Last name Bonney		Suffix	
		11 Nonqualified plans		12a See instructions for 12c	
		13a All other plans D		13b Retirement plan D	
		13c Third-party sick pay D		13d Other D	
1 Employee's address and ZIP code					
15 State: Employer's state ID number MD 521212121		18 State wages, tips, etc. 36117.17		17 State income tax 2457.97	
				18 Local wages, tips, etc.	
				19 Local income tax	
				20 Local name	

Form **W-2** Wage and Tax Statement **2015** Department of the Treasury-Internal Revenue Service
 Copy 1-For State, City, or Local Tax Department

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Department of Education Loan Serving P.O. Box 9635 Wlikes Barre, PA 18773		OMB No. 1545-1576 @15 Form 1098-E	Student Loan Interest Statement Copy A For Internal Revenue Service Center File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the 2015 General Instructions for Certain Information Returns.
RECIPIENT'S federal identification no. 52-1188991	BORROWER'S social security number 123-45-6789	1 Student loan interest received by lender \$ 4622.60	
BORROWER'S name Paulita Bonney			
Street address (including apt. no.) 168 Water Street			
City or town, state or province, country, and ZIP or foreign postal code St. Michaels, MD 21663			
Account number (see instructions) 93699933		2 Check if box 1 does not include loan origination fees and/or capitalized interest, and the loan was made before September 1, 2004 D	

Form 1098-E

Cat. No. 25088U

www.irs.gov/form10988

Department of the Treasury - Internal Revenue Service

Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page

Instructions for Borrower

A person (including a financial institution, a governmental unit, and an educational institution) that receives interest payments of \$600 or more during the year on one or more qualified student loans must furnish this statement to you.

You may be able to deduct student loan interest that you actually paid in 2015 on your income tax return. However, you may not be able to deduct the full amount of interest reported on this statement. Do not contact the recipient/lender for explanations of the requirements for (and how to figure) any allowable deduction for the interest paid. Instead, for more information, see Pub. 970, Tax Benefits for Education, and the Student Loan Interest Deduction Worksheet in your Form 1040 or 1040A instructions.

Borrower's identification number. For your protection, this form may show only the last four digits of your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN). However, the issuer has reported your complete identification number to the IRS.

Account number. May show an account or other unique number the lender assigned to distinguish your account.

Box 1. Shows the interest received by the lender during the year on one or more student loans made to you. For loans made on or after September 1, 2004, box 1 must include loan origination fees and capitalized interest received in 2015. If your loan was made before September 1, 2004, you may be able to deduct loan origination fees and capitalized interest not reported in box 1.

Box 2. If checked, indicates that loan origination fees and/or capitalized interest are **not** included in box 1 for loans made before September 1, 2004. See Pub. 970 for how to figure any deductible loan origination fees or capitalized interest.

Future developments. For the latest information about developments related to Form 1098-E and its instructions, such as legislation enacted after they were published, go to www.irs.gov/form1098e.

ALLY BANK
P.O. BOX 951
HORSHAM, PA 19044

Combined Statement For Form
1099-INT for Tax Year 2014

IMPORTANT TAX INFORMATION ENCLOSED

OMB No. 1545-0112

Forwarding Service Requested

DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE.

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

INTS
Paulita Bonney
123 Water ST
St. Michaels,
MD 21663

PAYER'S E.I.N.
2000000796
CUSTOMER SERV PH#
1-800-222-2559
TAXPAYER'S FEDERAL ID NO.
XXX-XX-6789

KEEP FOR YOUR RECORDS

ACCOUNT NUMBER	RS DESCRIPTION	IRS BOX #	AMOUNT
2111111012	Interest Income	1	262.56
	Early Withdrawal Penalty	2	0.00
	Interest on U.S. Savings Bonds and Treas. Obligations	3	0.00
	Federal Income Tax Withheld	4	0.00
	Investment Expenses	5	0.00
	Foreign Tax Paid	6	0.00
	Foreign Country or U.S. Possession	7	
	Tax-exempt Interest	8	0.00
	Specified Private Activity Bond Interest	9	0.00
	Tax-exempt Bond CUSIP no.	10	
	State	11	
	State Identification No.	12	
	State Tax Withheld	13	0.00
**• Total 1099-INT	Interest Income		262.56
	Early Withdrawal Penalty		0.00
	Interest on U.S. Savings Bonds and Treas. Obligations		0.00
	Federal Income Tax Withheld		0.00
	Investment Expenses		0.00
	Foreign Tax Paid		0.00
	Foreign Country or U.S. Possession		
	Tax-exempt Interest		0.00
	Specified Private Activity Bond Interest		0.00
	Tax-exempt Bond CUSIP no.		
	State		
	State Identification No.		
	State Tax Withheld		0.00



001366

St. Michaels,

Department of the Treasury - Internal Revenue Service

Rent and Royalty Income and Expenses

ORG25

BASIC PROPERTY INFORMATION

Property description: 10 Claw Drive
 Property type: * 1 If type is other, enter a description: _____
 Location (street address): 10 Claw Drive
 City: Saint Michaels State: MD Zip: 21663
 If a foreign address: Foreign province or state: _____
 Foreign postal code: _____ Foreign Country: _____

1 Check property owner ☐ Taxpayer ☐ Spouse ☒ Joint

2 a Did you make any payments that would require you to file Form(s) 1099? Yes ☐ No ☒
 b If **yes**, did you or will you file all required Forms(s) 1099? Yes ☐ No ☐

3 a Enter the ownership percentage (if not 100%) 100.000000
 b If not 100%, are you reporting 100% of the income and expenses? Yes ☐ No ☐

4 Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) Yes ☒ No ☐

5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? Yes ☐ No ☒

6 For all rental properties, **enter the number of days** during 2014 that:

a The property was rented at fair rental value 365
 b The property was used personally or rented at less than fair rental value 0
 c You owned the property, if not the entire year

7 a Does this rental have multiple living units and you live in one of the units? Yes ☐ No ☒
 b If **yes**, enter percentage of rental use

8 Did you actively participate in this property's management during 2014? Yes ☒ No ☐

9 Did you materially participate in this property's management during 2014? Yes ☐ No ☒

10 Do you want to treat this property as non-passive? Yes ☐ No ☒

11 Did this property have unallowed passive losses in 2013? Yes ☐ No ☒

12 Did you dispose of this property in a fully taxable transaction? Yes ☐ No ☒

13 Check this box if some of this investment was **not** at-risk Yes ☐ No ☐

14 a Treat all MACRS assets for this activity as qualified Indian reservation property? Yes ☐ No ☒

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular ☐ Extension ☐ No ☒

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? Yes ☐ No ☒

d Was this activity located in a Qualified Disaster Area? Yes ☐ No ☒

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME		2014	2013
15	Rents or royalties received	12,000.	
<div><div>* Property Types:</div><div><div>1 Single family residence</div><div>2 Multi-family residence</div><div>3 Vacation/short-term rental</div><div>4 Commercial</div></div><div><div>5 Land</div><div>6 Royalties</div><div>7 Self-rental</div><div>8 Other</div></div></div>			

Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2014	2013
Property location <u>10 Claw Drive, Saint Michaels, MD 21663</u>		
16 Advertising		
17a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance	300.	
19 Commissions.....		
20a Mortgage insurance premiums — qualified		
b Other insurance	1,200.	
21 Legal and professional fees	500.	
22 Management fees		
23a Mortgage interest paid to banks — qualified.....	4,325.	
b Mortgage interest paid to banks — other		
24 Other interest		
25 Repairs.....	1,475.	
26 Supplies.....		
27a Real estate taxes.....	2,200.	
b Other taxes.....		
28 Utilities	2,400.	
29 Other expenses:		
a		
b		
c		
d		
e		
30a Depreciation and Section 179 deduction (Preparer Use Only)		
b Depletion (Preparer Use Only).....		

Depreciation and Amortization Report

Tax Year 2014

- Keep for your records

2014

William H & Paulita T Bonney

Sch E - 10 Claw Drive

123-45-4321

[illegible]

* Code: S = Sold, A = Auto, L = Listed, H = Home Office

Medical Expenses:

Prescriptions	\$	520
Medical Insurance:	\$	4,800
Doctors:	\$	840
Dentist:	\$	1,060
Eye Glasses	\$	680

Personal Residence

Real estate taxes	\$	1,622
Mortgage Interest	\$	8,478 - Chase home mortgage

Charitable Contributions

St. Luke's Church	\$	1,425
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Addition Information

William contributed \$2,000 to his traditional IRA

Paulita contributed \$3,000 to her traditional IRA

William contributed \$3,500 to his Roth IRA

Paulita contributed \$2,500 to her Roth IRA

Name(s) Shown on Return	Social Security Number
-------------------------	------------------------

Description	Amount
Income	
Wages	
Interest income before Series EE bond exclusion	
Dividend income	
Tax refund	
Alimony received	
Nonpassive business income or loss	
Royalty and nonpassive rental activities income or loss	
Nonpassive partnership income or loss	
Nonpassive S corporation income or loss	
Nonpassive farm rental income or loss	
Nonpassive farm income or loss	
Nonpassive estate and trust income or loss	
Real estate mortgage investment conduits	
Business gains and losses from nonpassive activities	
Capital gains and losses	
Taxable IRA distributions	
Taxable pension distributions	
Unemployment compensation	
Other income	
Total income	
Adjustments	
Educator expenses	
Certain business expenses of reservists, performing artists, and government officials	
Health savings account deduction	
Moving expenses	
Self-employed SEP, SIMPLE, and qualified plans	
Self-employed health insurance deduction	
Penalty on early withdrawals of savings	
Alimony paid	
Other adjustments	
Total adjustments	
Modified adjusted gross income	

IRA Deduction Worksheet

2014

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Name(s) Shown on Return William H & Paulita T Bonney		Social Security Number 123-45-4321	
If filing a joint return, complete lines 1, 2, 3, and 5 for both spouses even if only one spouse has an IRA contribution.		(a) Your IRA	(b) Spouse's IRA
1	Check if covered by a retirement plan at work.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Enter your wages and other earned income.		
3	Maximum contribution allowed	5,500.	5,500.
4	Enter traditional IRA contributions made, or will be made by April 15, 2015, for 2014 (do not enter more than line 3)		
5	Enter Roth IRA contributions made, or will be made by April 15, 2015, for 2014 (do not enter more than line 3)		
Complete the rest of this worksheet for each column only if an amount has been entered on line 4 for that column.			
If (1) you are not filing a joint return, or (2) line 2, column a equals line 2, column b, then skip lines 6 through 9 and enter the smaller of line 2 or line 4 on line 10.			
6	Enter the sum of line 2, columns a and b (enter in both columns if there is an entry on line 4 in both columns)		
7	Enter the sum of line 3, columns a and b (enter in both columns if there is an entry on line 4 in both columns) If line 7 is less than line 6, skip lines 8 and 9 and enter the amount from line 4 on line 10.		
8	In the column with the lower amount on line 2, enter the smaller of line 2 or the sum of line 4 and line 5 from the column with the higher amount on line 2		
9	In the column with the lower amount on line 2, subtract line 8 from line 6. In the column with the higher amount on line 2, enter the smaller of line 2 or line 4		
10	Enter the smaller of line 4 or line 9		
If line 1, column a is not checked and, if filing a joint return, line 1, column b is also not checked, skip lines 11 through 15 and enter the amount from line 10 on line 16.			
11	If filing a joint return, enter \$116,000 in the column with the box on line 1 checked, and enter \$191,000 in the column with the box on line 1 not checked. If single or head of household, enter \$70,000 in column a. If qualifying widow(er), enter \$116,000 in column a. If married filing separately, enter \$70,000 (\$10,000 if you lived with your spouse at any time during 2014) in column a	116,000.	116,000.
12	Enter your modified adjusted gross income. If equal to or more than line 11, enter zero on line 15 and go to line 16 . .		
13	Subtract line 12 from line 11. If the result is \$10,000 or more (\$20,000 or more if filing joint and the box on line 1 is checked, or if a qualifying widow(er)), enter the amount from line 3 on line 15 and go to line 16.		
14	Fraction of line 13 that is deductible	0.275	0.275
15	Multiply line 13 by line 14. Round up to the next multiple of \$10. If less than \$200, enter \$200		
16	IRA deduction. Enter the smaller of line 10 or line 15.		