2D Test 3

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 2009

(99) IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2009, or other tax year beginning , 2009, ending , 20 OMB No. 1545-0074

Label

(See instructions on page 14.)

Use the IRS label. Otherwise, please print or type.

LABEL HERE

Your first name and initial	Last name	Your social security number
Tim R	Taylor	4 0 0 0 0 6 1 1 3
If a joint return, spouse's first name and initial	Last name	Spouse's social security number
Susan M	Taylor	4 0 0 0 0 6 1 1 4
Home address (number and street). If you have a P.O. box, see page 14.	Apt. no.	▲ You **must** enter your SSN(s) above. ▲
201 Binford Avenue		
City, town or post office, state, and ZIP code. If you have a foreign address, see page 14.		Checking a box below will not change your tax or refund.
Chillicothe MO 64601		

Presidential Election Campaign ▶ Check here if you, or your spouse if filing jointly, want $3 to go to this fund (see page 14) ▶ ☐ **You** ☐ **Spouse**

Filing Status

Check only one box.

1 ☐ Single
2 ☑ Married filing jointly (even if only one had income)
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See page 15.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child (see page 16)

Exemptions

6a ☑ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a . . . . . **Boxes checked on 6a and 6b** 2

b ☑ **Spouse** . . . .

c **Dependents:**

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 17)
Sally Taylor	4 0 0 0 0 6 1 1 5	Daughter	☐
			☐
			☐
			☐

If more than four dependents, see page 17 and check here ▶ ☐

No. of children on 6c who:
- **lived with you** 1
- **did not live with you due to divorce or separation (see page 18)**

Dependents on 6c not entered above

d Total number of exemptions claimed . . . . **Add numbers on lines above** ▶ 3

Income

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 page 22.

Enclose, but do not attach, any payment. Also, please use **Form 1040-V.**

7	Wages, salaries, tips, etc. Attach Form(s) W-2			7	77127	00
8a	**Taxable** interest. Attach Schedule B if required			8a	450	00
b	**Tax-exempt** interest. **Do not** include on line 8a	8b				
9a	Ordinary dividends. Attach Schedule B if required			9a	82	00
b	Qualified dividends (see page 22)	9b				
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 23)			10	2357	00
11	Alimony received			11		
12	Business income or (loss). Attach Schedule C or C-EZ			12		
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐			13		
14	Other gains or (losses). Attach Form 4797			14		
15a	IRA distributions	15a		15b		
	b Taxable amount (see page 24)					
16a	Pensions and annuities	16a	5115	16b		
	b Taxable amount (see page 25)					
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E			17		
18	Farm income or (loss). Attach Schedule F			18		
19	Unemployment compensation in excess of $2,400 per recipient (see page 27)			19		
20a	Social security benefits	20a	21380 00	20b	18173	00
	b Taxable amount (see page 27)					
21	Other income. List type and amount (see page 29)			21		
22	Add the amounts in the far right column for lines 7 through 21. This is your **total income** ▶			22	98189	00

Adjusted Gross Income

23	Educator expenses (see page 29)	23				
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24				
25	Health savings account deduction. Attach Form 8889	25				
26	Moving expenses. Attach Form 3903	26				
27	One-half of self-employment tax. Attach Schedule SE	27				
28	Self-employed SEP, SIMPLE, and qualified plans	28				
29	Self-employed health insurance deduction (see page 30)	29				
30	Penalty on early withdrawal of savings	30				
31a	Alimony paid b Recipient's SSN ▶	31a				
32	IRA deduction (see page 31)	32				
33	Student loan interest deduction (see page 34)	33				
34	Tuition and fees deduction. Attach Form 8917	34				
35	Domestic production activities deduction. Attach Form 8903	35				
36	Add lines 23 through 31a and 32 through 35			36	0	00
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶			37	98189	00

Tax and Credits

Standard Deduction for—
- People who check any box on line 39a, 39b, or 40b **or** who can be claimed as a dependent, see page 35.
- All others:

Single or Married filing separately, $5,700

Married filing jointly or Qualifying widow(er), $11,400

Head of household, $8,350

38	Amount from line 37 (adjusted gross income)			38	98189 00
39a	Check if: ☐ **You** were born before January 2, 1945, ☐ Blind. ☐ **Spouse** was born before January 2, 1945, ☐ Blind. **Total boxes checked** ▶ **39a** ☐				
b	If your spouse itemizes on a separate return or you were a dual-status alien, see page 35 and check here ▶ **39b** ☐				
40a	**Itemized deductions** (from Schedule A) **or** your **standard deduction** (see left margin)			40a	51157 00
b	If you are increasing your standard deduction by certain real estate taxes, new motor vehicle taxes, or a net disaster loss, attach Schedule L and check here (see page 35) ▶ **40b** ☐				47032 00
41	Subtract line 40a from line 38			41	
42	**Exemptions.** If line 38 is $125,100 or less and you did not provide housing to a Midwestern displaced individual, multiply $3,650 by the number on line 6d. Otherwise, see page 37			42	10950 00
43	**Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-			43	36082 00
44	**Tax** (see page 37). Check if any tax is from: **a** ☐ Form(s) 8814 **b** ☐ Form 4972			44	4576 00
45	**Alternative minimum tax** (see page 40). Attach Form 6251			45	
46	Add lines 44 and 45 ▶			46	4576 00
47	Foreign tax credit. Attach Form 1116 if required	47			
48	Credit for child and dependent care expenses. Attach Form 2441	48			
49	Education credits from Form 8863, line 29	49			
50	Retirement savings contributions credit. Attach Form 8880	50			
51	Child tax credit (see page 42)	51			
52	Credits from Form: **a** ☐ 8396 **b** ☐ 8839 **c** ☐ 5695	52			
53	Other credits from Form: **a** ☐ 3800 **b** ☐ 8801 **c** ☐	53			
54	Add lines 47 through 53. These are your **total credits**			54	0 00
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0- ▶			55	4576 00

Other Taxes

56	Self-employment tax. Attach Schedule SE	56	
57	Unreported social security and Medicare tax from Form: **a** ☐ 4137 **b** ☐ 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59	Additional taxes: **a** ☐ AEIC payments **b** ☐ Household employment taxes. Attach Schedule H	59	
60	Add lines 55 through 59. This is your **total tax** ▶	60	4576 00

Payments

If you have a qualifying child, attach Schedule EIC.

61	Federal income tax withheld from Forms W-2 and 1099	61	5873 00		
62	2009 estimated tax payments and amount applied from 2008 return	62			
63	Making work pay and government retiree credits. Attach Schedule M	63	550 00		
64a	**Earned income credit (EIC)**	64a			
b	Nontaxable combat pay election **64b**				
65	Additional child tax credit. Attach Form 8812	65			
66	Refundable education credit from Form 8863, line 16	66			
67	First-time homebuyer credit. Attach Form 5405	67			
68	Amount paid with request for extension to file (see page 62)	68			
69	Excess social security and tier 1 RRTA tax withheld (see page 62)	69			
70	Credits from Form: **a** ☐ 2439 **b** ☐ 4136 **c** ☐ 8801 **d** ☐ 8885	70			
71	Add lines 61, 62, 63, 64a, and 65 through 70. These are your **total payments** ▶			71	6423 00

Refund

Direct deposit? See page 62 and fill in 73b, 73c, and 73d, or Form 8888.

72	If line 71 is more than line 60, subtract line 60 from line 71. This is the amount you **overpaid**			72	
73a	Amount of line 72 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐			73a	1847 00
▶ b	Routing number ▶ **c** Type: ☐ Checking ☐ Savings				
▶ d	Account number				
74	Amount of line 72 you want **applied to your 2010 estimated tax** ▶	74			

Amount You Owe

75	**Amount you owe.** Subtract line 71 from line 60. For details on how to pay, see page 64 ▶			75	
76	Estimated tax penalty (see page 64)	76			

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 65)? ☐ **Yes.** Complete the following. ☐ **No**

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

Sign Here

Joint return? See page 15. 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	

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed), address, and ZIP code ▶		EIN	
		Phone no.	

SCHEDULE M
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)

Making Work Pay and Government Retiree Credits

▶ **Attach to Form 1040A, 1040, or 1040NR.** ▶ **See separate instructions.**

OMB No. 1545-0074

2009

Attachment Sequence No. **166**

Name(s) shown on return: Tim R Taylor

Your social security number: 400 00 6113

1a **Important:** See the instructions if you can be claimed as someone else's dependent, you have a net loss from a business, your wages include pay for work performed while an inmate in a penal institution, or you are filing Form 1040NR, 2555, or 2555-EZ. Residents of Puerto Rico or American Samoa, see Pub. 570.

Do you (and your spouse if filing jointly) have 2009 wages of more than $6,451 ($12,903 if married filing jointly)?

☑ **Yes.** Skip lines 1a through 3. Enter $400 ($800 if married filing jointly) on line 4 and go to line 5.
☐ **No.** Enter your earned income (see instructions) **1a**

b Nontaxable combat pay included on line 1a (see instructions). **1b**

2 Multiply line 1a by 6.2% (.062) **2**

3 Enter $400 ($800 if married filing jointly) **3**

4 Enter the **smaller** of line 2 or line 3 (unless you checked "Yes" on line 1a) **4** 800 00

5 Enter the amount from Form 1040, line 38*, or Form 1040A, line 22 . **5** 98189 00

6 Enter $75,000 ($150,000 if married filing jointly) **6** 150000 00

7 Is the amount on line 5 more than the amount on line 6?
☑ **No.** Skip line 8. Enter the amount from line 4 on line 9 below.
☐ **Yes.** Subtract line 6 from line 5 . . . . **7**

8 Multiply line 7 by 2% (.02) **8**

9 Subtract line 8 from line 4. If zero or less, enter -0- **9** 800 00

10 Did you (or your spouse, if filing jointly) receive an economic recovery payment in 2009? You may have received this payment if you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits (see instructions).

☐ **No.** Enter -0- on line 10 and go to line 11.
☑ **Yes.** Enter the total of the payments received by you (and your spouse, if filing jointly). Do not enter more than $250 ($500 if married filing jointly) . . . **10** 250 00

11 Did you (or your spouse, if filing jointly) receive a pension or annuity in 2009 for services performed as an employee of the U.S. Government or any U.S. state or local government from work **not** covered by social security? Do not include any pension or annuity reported on Form W-2.

☐ **No.** Enter -0- on line 11 and go to line 12.
☐ **Yes.**
- If you checked "No" on line 10, enter $250 ($500 if married filing jointly and the answer on line 11 is "Yes" for both spouses)
- If you checked "Yes" on line 10, enter -0- (exception: enter $250 if filing jointly and the spouse who received the pension or annuity did not receive an economic recovery payment described on line 10) . . . **11**

12 Add lines 10 and 11 . . . . **12** 250 00

13 Subtract line 12 from line 9. If zero or less, enter -0- **13** 550 00

14 **Making work pay and government retiree credits.** Add lines 11 and 13. Enter the result here and on Form 1040, line 63; Form 1040A, line 40; or Form 1040NR, line 60 . . . . **14** 550 00

*If you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico, see instructions.

SCHEDULE A (Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Itemized Deductions

▶ Attach to Form 1040. ▶ See Instructions for Schedule A (Form 1040).

OMB No. 1545-0074

2009

Attachment Sequence No. 07

Name(s) shown on Form 1040: Tim R Taylor

Your social security number: 400006113

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.						
	1	Medical and dental expenses (see page A-1)	1	8614	00			
	2	Enter amount from Form 1040, line 38 — 2: 98189 00						
	3	Multiply line 2 by 7.5% (.075)	3	7364	00			
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-				4	1250	00
Taxes You Paid (See page A-2.)	5	State and local **(check only one box):** a ☑ Income taxes, **or** b ☐ General sales taxes	5	6901	00			
	6	Real estate taxes (see page A-5)	6	6150	00			
	7	New motor vehicle taxes from line 11 of the worksheet on back. Skip this line if you checked box 5b	7		00			
	8	Other taxes. List type and amount ▶	8					
	9	Add lines 5 through 8				9	13051	00
Interest You Paid (See page A-5.) **Note.** Personal interest is not deductible.	10	Home mortgage interest and points reported to you on Form 1098	10	14500	00			
	11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see page A-6 and show that person's name, identifying no., and address ▶	11					
	12	Points not reported to you on Form 1098. See page A-6 for special rules	12					
	13	Qualified mortgage insurance premiums (see page A-6)	13	500	00			
	14	Investment interest. Attach Form 4952 if required. (See page A-6.)	14					
	15	Add lines 10 through 14				15	15000	00
Gifts to Charity If you made a gift and got a benefit for it, see page A-7.	16	Gifts by cash or check. If you made any gift of $250 or more, see page A-7	16	10000	00			
	17	Other than by cash or check. If any gift of $250 or more, see page A-8. You **must** attach Form 8283 if over $500	17					
	18	Carryover from prior year	18					
	19	Add lines 16 through 18				19	10000	00
Casualty and Theft Losses	20	Casualty or theft loss(es). Attach Form 4684. (See page A-8.)				20		
Job Expenses and Certain Miscellaneous Deductions (See page A-9.)	21	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See page A-9.) ▶	21	13620	00			
	22	Tax preparation fees	22	200	00			
	23	Other expenses—investment, safe deposit box, etc. List type and amount ▶	23					
	24	Add lines 21 through 23	24	13820	00			
	25	Enter amount from Form 1040, line 38 — 25						
	26	Multiply line 25 by 2% (.02)	26	1964	00			
	27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-				27	11856	00
Other Miscellaneous Deductions	28	Other—from list on page A-10. List type and amount ▶				28		
Total Itemized Deductions	29	Is Form 1040, line 38, over $166,800 (over $83,400 if married filing separately)? ☑ **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 40a. ☐ **Yes.** Your deduction may be limited. See page A-10 for the amount to enter. ▶				29	51157	00
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ ☐						