US 1040 Main Information Sheet 2011

PRINTED 01/17/2012

			Taxpayer	Spouse
BEN A	BAYLOR	SSN	221-02-0752	222-02-0752
PAT N	HARPER	Birth	03/12/1934	10/30/1936
BEN A BAYLOR		Death		06/21/2011
30911 LOST MEADOW		Day Phone	713-235-1111	
PLUCKEMIN NJ 07978-		Evening		
		Cell or Fax		
		PIN	12345	

Email

Taxpayer Occupation RETIRED   Spouse Occupation DECEASED

Filing Status MARRIED FILING JOINT

MADISON	CHAMBERS	04/05/1994	223-02-0752	GRANDCHILD	12	1

Preparer ID: ________ **Preparation Fee:** ________ **Date:** ________

Preparer: ________ **Time in return** ________ **min.**

Recap of 2011 Income Tax Return

Earned Income		**Federal Tax**	2,394.
Federal AGI	52,303.	**Withholding**	2,380.
Taxable Income	23,255.	**Refund/(Due)**	(14.)
EIC		**Tax Bracket**	15.0 %

State	NJ				
Tax					
Withholding					
Refund/Due					
State					
Tax					
Withholding					
Refund/Due					

	Maximum RAL	Partial RAL	2 week check	2 week deposit
Qualifying refund				
Fees				
Net refund				
Fast check				
2 week check				
State check				
Check one				

1040, 1040A, 1040EZ, 1040NR Income Worksheet

Name: BEN A BAYLOR & PAT N HARPER **SSN:** 221-02-0752

Interest. List all interest on Schedule B, regardless of the amount.
Unemployment and/or state tax refund. Fill out 1099G worksheet

Additional Earned Income	Taxpayer	Spouse	Total
Scholarship income - no W2			
Household employee income - no W2			

Social Security/Railroad Tier 1 Benefits	Taxpayer	Spouse	Total
Social Security received this year	12,108.	7,920.	
Railroad tier 1 received this year			
Total	12,108.	7,920.	20,028.
Medicare to Schedule A	1,761.	1,269.	
Federal tax withheld	300.	300.	

Married Filing Separately
If the filing status is married filing separately and the taxpayer and spouse lived together at any time during the year, up to 85% of social security and railroad benefits received are taxable. See Main Information Sheet, filing status 3 ....

All others
Modified adjusted gross income for this computation consists of AGI (without social security or railroad benefits) + Form 8815, line 14, + Form 8839, line 30 + Form 2555 (EZ) exclusions + student loan interest adjustment 40,644.
+ tax-exempt interest: ________ and excluded income from American Samoa (Form 4563) or Puerto Rico: ________ + 50% of the benefits received: 10,014. .... 50,658.

If the modified AGI is less than $25,001 ($32,001 married filing jointly), none of the Social Security and RR Benefits are taxable ....

If the modified AGI is between $25,000 and $34,000 ($32,000 and $44,000 married filing joIntly), 50% of the benefits received is taxable ....

If the modified AGI is greater than $34,000 ($44,000 married filing jointly):
85% of the social security and railroad benefits received is taxable .... **A** 17,024.

Modified AGI	50,658.		
$34,000 ($44,000)	44,000.		
Subtract	6,658.	X 85%=	5,659.

Minimum 50% of the benefits received or $4,500 ($6,000 married filing jointly) .... 6,000.
Add .... **B** 11,659.
Taxable social security and railroad retirement tier 1. Minimum of A or B .... 11,659.

Lump Sum Payment of Social Security and Railroad Tier 1 Benefits

	Taxpayer	Spouse	Total
Gross amount received attributable to 2011			
Using the above modified AGI, this is the taxable amount of the 2011 benefit			
Amounts taxable from previous years			
Taxable benefits using the lump-sum election method			

DECEASED PAT N HARPER 06/21/2011

Form **1040** Department of the Treasury - Internal Revenue Service (99)
U.S. Individual Income Tax Return **2011** OMB No. 1545-0074 IRS Use Only-Do not write or staple in this space.

For the year Jan. 1-Dec. 31, 2011, or other tax year beginning ,2011, ending ,20 — See separate instructions.

Your first name and initial: BEN A BAYLOR	Last name	**Your social security number** 221-02-0752
If a joint return, spouse's first name and initial: PAT N HARPER	Last name	**Spouse's social security no.** 222-02-0752
Home address (number and street). If you have a P.O. box, see instructions. 30911 LOST MEADOW BEN A BAYLOR	Apt. no.	▲ Make sure the SSN(s) above and on line 6c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). PLUCKEMIN NJ 07978-		**Presidential Election Campaign** Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse
Foreign country name	Foreign province/county	Foreign postal code

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 instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child

Exemptions

6a ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☒ **Spouse**

Boxes checked on 6a and 6b: 2

c **Dependents:** (If more than four dependents, see instr. and check here ▶ ☐)

(1) First name Last name	(2) Dependent's social security no.	(3) Dependent's relationship to you	(4) ✓ if child under age 17 qualifying for child tax credit (see instr.)
MADISON CHAMBERS	223-02-0752	GRANDCHILD	

No. of children on 6c who:
- lived with you: 1
- did not live with you due to divorce or separation (see instr.): 0

Dependents on 6c not entered above: 0

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 instructions.

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

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	
8a	**Taxable** interest. Attach Schedule B if required	8a	
b	**Tax-exempt** interest. **Do not** include on line 8a — 8b		
9a	Ordinary dividends. Attach Schedule B if required	9a	1,565.
b	Qualified dividends — 9b: 875.		
10	Taxable refunds, credits, or offsets of state and local income taxes	10	
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	737.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions — 15a; b Taxable amount	15b	
16a	Pensions and annuities — 16a; b Taxable amount	16b	37,142.
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	19	
20a	Social security benefits — 20a: 20,028.; b Taxable amount	20b	11,659.
21	Other income. List type and amount (see instr.) GAMBLING WINNINGS	21	1,200.
22	Combine the amounts in the far right column for lines 7 through 21. This is your **total income** ▶	22	52,303.

Adjusted Gross Income

23	Educator expenses	23	
24	Certain business expenses of reservists, performing artists, and fee-basis gov. 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	Deductible part of self-employment tax. Attach Schedule SE	27	
28	Self-employed SEP, SIMPLE, and qualified plans	28	
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶	31a	
32	IRA deduction	32	
33	Student loan interest deduction	33	
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶	37	52,303.

Tax and Credits

38	Amount from line 37 (adjusted gross income)	38	52,303.
39a	Check if: [X] You were born before Jan. 2, 1947, [ ] Blind. [X] Spouse was born before Jan. 2, 1947, [ ] Blind. Total boxes checked ▶ 39a 2		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b [ ]		
40	**Itemized deductions** (from Schedule A) **or** your **standard deduction** (see left margin)	40	17,948.
41	Subtract line 40 from line 38	41	34,355.
42	**Exemptions.** Multiply $3,700 by the number on line 6d	42	11,100.
43	**Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	23,255.
44	**Tax** (see instructions). Check if any tax is from: a [ ] Form(s) 8814 b [ ] Form 4972 c [ ] 962 election	44	2,394.
45	**Alternative minimum tax** (see instructions). Attach Form 6251	45	
46	Add lines 44 and 45 ▶	46	2,394.
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 23 — 49		
50	Retirement savings contributions credit. Attach Form 8880 — 50		
51	Child tax credit (see instructions) — 51		
52	Residential energy credits. Attach Form 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	
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0- ▶	55	2,394.

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, $5,800

Married filing jointly or Qualifying widow(er), $11,600

Head of household, $8,500

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	
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Other taxes. Enter code(s) from instructions	60	
61	Add lines 55 through 60. This is your **total tax** ▶	61	2,394.

Payments

62	Federal income tax withheld from Forms W-2 and 1099	62	2,380.		FORM 1099
63	2011 estimated tax payments and amount applied from 2010 return	63			
64a	**Earned income credit (EIC)**	64a			
b	Nontaxable combat pay election 64b				
65	Additional child tax credit. Attach Form 8812	65			
66	American opportunity credit from Form 8863, line 14	66			
67	First-time homebuyer credit from Form 5405, line 10	67			
68	Amount paid with request for extension to file	68			
69	Excess social security and tier 1 RRTA tax withheld	69			
70	Credit for federal tax on fuels. Attach Form 4136	70			
71	Credits from Form: a [ ] 2439 b [ ] 8839 c [ ] 8801 d [ ] 8885	71			
72	Add lines 62, 63, 64a, and 65 through 71. These are your **total payments** ▶			72	2,380.

If you have a qualifying child, attach Schedule EIC.

Refund

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you **overpaid**	73	
74a	Amount of line 73 you want **refunded to you.** If Form 8888 is attached, check here ▶ [ ]	74a	
▶ b	Routing number ▶ c Type: [ ] Checking [ ] Savings		
▶ d	Account number		
75	Amount of line 73 you want **applied to your 2012 estimated tax** ▶ 75		

Direct deposit? See instructions

Amount You Owe

76	**Amount you owe.** Subtract line 72 from line 61. For details on how to pay, see inst. ▶	76	14.
77	Estimated tax penalty (see instructions) — 77		

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? [ ] **Yes.** Complete below. [X] **No**

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

Sign Here

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.

Joint return? See instr. Keep a copy for your records.

Your signature	Date	Your occupation	Daytime phone number
		RETIRED	713-235-1111
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 (see inst.)
		DECEASED	

Paid Preparer's Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no.	

What Is Form 1040-V and Do You Have To Use It?

It is a statement you send with your check or money order for any balance due on the "Amount you owe" line of your 2011 Form 1040, Form 1040A, or Form 1040EZ. Using Form 1040-V allows us to process your payment more accurately and efficiently. We strongly encourage you to use Form 1040-V, but there is no penalty if you do not.

How To Fill In Form 1040-V

Line 1. Enter your social security number (SSN). If you are filing a joint return, enter the SSN shown first on your return.
Line 2. If you are filing a joint return, enter the SSN shown second on your return.
Line 3. Enter the amount you are paying by check or money order.
Line 4. Enter your name(s) and address exactly as shown on your return. Please print clearly.

How To Prepare Your Payment

- Make your check or money order payable to "United States Treasury." Do not send cash.
- Make sure your name and address appear on your check or money order.
- Enter your daytime phone number and your SSN on your check or money order. If you are filing a joint return, enter the SSN shown first on your return. Also enter "2011 Form 1040," "2011 Form 1040A," or "2011 Form 1040EZ," whichever is appropriate.
- To help us process your payment, enter the amount on the right side of your check like this: $ XXX.XX. Do not use dashes or lines (for example, do not enter "$ XXX-" or "$ XXX xx/100").

How To Send In Your 2011 Tax Return, Payment, and Form 1040-V

- Detach Form 1040-V along the dotted line.
- Do not staple or otherwise attach your payment or Form 1040-V to your return or to each other. Instead, just put them loose in the envelope.
- Mail your 2011 tax return, payment, and Form 1040-V to the address shown on page 2 that applies to you.

▼ **Detach Here and Mail With Your Payment and Return** ▼

**Department of the Treasury
Internal Revenue Service**

2011

Form 1040-V Payment Voucher

- Use this voucher when making a payment with Form 1040.
- Do not staple this voucher or your payment to Form 1040.
- Make your check or money order payable to the "United States Treasury."
- Write your social security number (SSN) on your check or money order.

221-02-0752 222-02-0752

Enter the amount of your payment ▶	Dollars	Cents
	14.	

1045

BEN A BAYLOR & PAT N HARPER
30911 LOST MEADOW
PLUCKEMIN NJ 07978-

PO BOX 970011
St. Louis MO 63197-0011

221020752 KJ BAYL 30 0 201112 610

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

2011

Attachment Sequence No. **07**

Name(s) shown on Form 1040: BEN A BAYLOR & PAT N HARPER

Your social security no. 221-02-0752

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1	15,124.		
	2	Enter amount from Form 1040, line 38 — 2: 52,303.				
	3	Multiply line 2 by 7.5% (.075)	3	3,923.		
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	11,201.
Taxes You Paid	5	State and local **(check only one box):** a ☐ Income taxes, **or** b ☒ General sales taxes	5	861.		
	6	Real estate taxes (see instructions)	6	498.		
	7	Personal property taxes	7	623.		
	8	Other taxes. List type and amount ▶	8			
	9	Add lines 5 through 8			9	1,982.
Interest You Paid	10	Home mortgage interest & points reported to you on Form 1098	10	2,164.		
	11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see inst. and show that person's name, identifying no., and address ▶	11			
Note. Your mortgage interest deduction may be limited (see instructions).	12	Points not reported to you on Form 1098. See instructions for special rules	12			
	13	Mortgage insurance premiums (see instructions)	13			
	14	Investment interest. Attach Form 4952 if required. (See inst.)	14			
	15	Add lines 10 through 14			15	2,164.
Gifts to Charity	16	Gifts by cash or check. If you made any gift of $250 or more, see instructions	16	1,051.		
If you made a gift and got a benefit for it, see instructions.	17	Other than by cash or check. If any gift of $250 or more, see instructions. You **must** attach Form 8283 if over $500	17	350.		
	18	Carryover from prior year	18			
	19	Add lines 16 through 18			19	1,401.
Casualty and Theft Losses	20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)			20	
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.) ▶	21			
	22	Tax preparation fees	22			
	23	Other expenses - investment, safe deposit box, etc. List type and amount ▶	23			
	24	Add lines 21 through 23	24			
	25	Enter amount from Form 1040, line 38 — 25				
	26	Multiply line 25 by 2% (.02)	26			
	27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-			27	
Other Miscellaneous Deductions	28	Other - from list in the inst. List type and amount ▶ GAMBLING LOSSES 1,200.			28	1,200.
Total Itemized Deductions	29	Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40			29	17,948.
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ ☐				

US Schedule A — Itemized Deduction Detail Worksheet — 2011

Name: BEN A BAYLOR & PAT N HARPER **SSN:** 221-02-0752

Medical Expenses — **Medical miles:** 1116 **Deduction:** 237.

Insurance premiums paid (not pre-tax)			Medicare from 1040 worksheet	3,030.
Taxpayer			Remainder from worksheets	
Spouse			Taxpayer	
Qualified long term care contracts			Spouse	
Taxpayer			Self-employed health insurance	
Spouse			Taxpayer	
Other medical expenses			Spouse	
DOCTOR BILLS		4,723.		
HOSPITAL BILLS		5,168.		
PRESCRIPTION DRUGS		1,756.		
PRESCRIPTION EYEGLASSES		210.	Amount from additional worksheets	
			Total	15,124.

Cash Contributions

50% Limit Organizations — **Other Charitable miles:** X .14 =

CHURCH	850.		
PBS	201.		
		From Schedules K-1	
		Amount from additional worksheets	
		Total	1,051.

30% Limit Organizations — **Charitable miles:** X .14 =

		Schedules K-1	
		Amount from additional worksheets	
		Total	

Other Than Cash Contributions — **50% Limit Organizations**

SALVATION ARMY	350.	From Forms 8283	
		Amount from additional worksheets	
From Schedules K-1		**Total**	350.

30% Limit Capital gain property donated to 50% limit organizations.

		From Forms 8283	
From Schedules K-1		**Total**	

30% Limit Not capital gain property donated to 30% limit organizations.

		From Forms 8283	
From Schedules K-1		**Total**	

20% Limit Organization Capital gain property donated to 30% limit organizations.

		From Forms 8283	
From Schedules K-1		**Total**	

Contribution Carryovers

	From years 2006 through 2010				To 2012 tax year			
	Cash and other property		Capital gain property		Cash and other property		Capital gain property	
	50%	30%	30%	20%	50%	30%	30%	20%
2006								
2007								
2008								
2009								
2010								
2011								

Contributions allowed this year

50% of adjusted gross income	26,152.	
This year's 50% organization cash contributions allowed		1,401.
30% of adjusted gross income	15,691.	
This year's capital gain contributions to 50% organizations limited to 30%		
50% cash carryover allowed		
50% capital gain carryover limited to 30%		
This year's 30% organization cash and other property contributions allowed		
30% organizations cash and other property carryover		
20% of adjusted gross income	10,461.	
This year's capital gain contributions to 30% organizations limited to 20%		
30% capital gain carryover limited to 20% AGI		
Total contributions allowed this year		1,401.

SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)

Interest and Ordinary Dividends

▶ **Attach to Form 1040A or 1040.** ▶ **See Instructions.**

OMB No. 1545-0074

2011

Attachment Sequence No. **08**

Name(s) shown on return: BEN A BAYLOR & PAT N HARPER

Your social security number: 221-02-0752

Part I Interest

(See instructions 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.

			Amount
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 ▶	1	
2	Add the amounts on line 1	2	
3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4	Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶	4	

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

Part II Ordinary Dividends

(See instructions 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.

			Amount
5	List name of payer ▶		
	THE LONE STAR FUND	5	1,565.
6	Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶	6	1,565.

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.

		Yes	No
7a	At any time during 2011, 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 instrs.		X
	If "Yes," are you required to file Form TD F 90-22.1 to report that financial interest or signature authority? See Form TD F 90-22.1 and its instructions for filing requirements and exceptions to those requirements		
b	If you are required to file Form TD F 90-22.1, enter the name of the foreign country where the financial account is located ▶		
8	During 2011, 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 on back		X

US Schedule D — Schedule D Tax Worksheet — 2011

Name: BEN A BAYLOR & PAT N HARPER — SSN: 221-02-0752

1	Taxable income from Form 1040, line 43, Form 1040NR, line 40, Form 1040A, line 27, or from the Foreign Earned Income Tax Worksheet				23,255.
2	Qualified dividends from Form 1040, line 9b, Form 1040A, line 9b, or Form 1040NR, line 10b	875.			
3	Line 4g of Form 4952				
4	Line 4e of Form 4952				
5	Subtract line 4 from line 3				
6	Subtract line 5 from line 2. If -0- or less, enter -0-		875.		
7	Smaller of line 15 or line 16 of Schedule D	737.			
8	Smaller of line 3 or line 4				
9	Subtract line 8 from line 7. If -0- or less, enter -0-		737.		
10	Add lines 6 and 9			1,612.	
11	Add lines 18 and 19 of Schedule D				
12	Smaller of line 9 or line 11				
13	Subtract line 12 from line 10. If -0- or less, enter -0-				1,612.
14	Subtract line 13 from line 1. If -0- or less, enter -0-				21,643.
15	Smaller of line 1 or $69,000 if married filing jointly or qualifying widow(er); $34,500, if single or married filing separately; $46,250 if head of household		23,255.		
16	Smaller of line 14 or line 15		21,643.		
17	Subtract line 10 from line 1. If -0- or less, enter -0-	21,643.			
18	Larger of line 16 or line 17			21,643.	
19	Subtract line 16 from line 15			1,612.	
20	Smaller of line 1 or line 13				
21	Amount from line 19				
22	Subtract line 21 from line 20				
23	Multiply line 22 by 15%				
24	Smaller of line 9 above or Schedule D, line 19				
25	Add lines 10 and 18				
26	Amount from line 1				
27	Subtract line 26 from line 25. If -0- or less, enter -0-				
28	Subtract line 27 from line 24. If -0- or less, enter -0-				
29	Multiply line 28 by 25%				
30	Add lines 18, 19, 22, and 28				
31	Subtract line 30 from line 1				
32	Multiply line 31 by 28%				
33	Tax on line 18 amount				2,394.
34	Add lines 23, 29, 32, and 33				2,394.
35	Tax on line 1 amount				2,641.
36	**Tax on all taxable income.** Smaller of lines 34 or 35				2,394.

 USSCHD$3

221-02-0752

W-2G DETAIL REPORT - 2011

Payer	EIN	TP|SP	Federal Withheld	Gross Winnings	State Withheld	Losses
CASINO REALE	21-8020752	X	200	1200	120	2550
			200	1200	120	2550

221-02-0752

1099-R DETAIL REPORT - 2011

Payer	EIN	T S	Box 7	IRA/SEP Simple	Fed. With.	State With.	Gross	1099R Taxable	Roll/ Exclude	Net	Cost	Cost Bal.
DEFENSE FINANCE AND	11-2020752	T	7		1580NJ		23919	23919		23919		
HARRIS TRUST	21-7020752	T	7		NJ		13223	13223		13223		
					----		-----	-----		-----		
					1580		37142	37142		37142		

Form **8879**

Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization

▶ **Do not send to the IRS. This is not a tax return.**
▶ **Keep this form for your records. See instructions.**

OMB No. 1545-0074

2011

Declaration Control Number (DCN) ▶

Taxpayer's name	**Social security number**
BEN A BAYLOR	221-02-0752
Spouse's name	**Spouse's social security number**
PAT N HARPER	222-02-0752

Part I **Tax Return Information-Tax Year Ending December 31, 2011** (Whole Dollars Only)

1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4)	1	52,303.
2	Total tax (Form 1040, line 61; Form 1040A, line 35; Form 1040EZ, line 10)	2	2,394.
3	Federal income tax withheld (Form 1040, line 62; Form 1040A, line 36; Form 1040EZ, line 7)	3	2,380.
4	Refund (Form 1040, line 74a; Form 1040A, line 43a; Form 1040EZ, line 11; Form 1040-SS, Part I, line 12a)	4	
5	Amount you owe (Form 1040, line 76; Form 1040A, line 45; Form 1040EZ, line 12)	5	14.

Part II **Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)**

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2011, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS **(a)** an acknowledgment of receipt or reason for rejection of the transmission, **(b)** the reason for any delay in processing the return or refund, and **(c)** the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). In order for me to initiate future payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

[X] I authorize TRAINING to enter or generate my PIN 12345
ERO firm name — **Enter five numbers, but do not enter all zeros**
as my signature on my tax year 2011 electronically filed income tax return.

[ ] I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ ______________________ Date ▶ 01/01/2012

Spouse's PIN: check one box only

[ ] I authorize ______________________ to enter or generate my PIN [ ]
ERO firm name — **Enter five numbers, but do not enter all zeros**
as my signature on my tax year 2011 electronically filed income tax return.

[ ] I will enter my PIN as my signature on my tax year 2011 electronically filed income tax return. Check this box **only** if you are entering your own PIN **and** your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ ______________________ Date ▶ ______________________

Practitioner PIN Method Returns Only-continue below

Part III **Certification and Authentication-Practitioner PIN Method Only**

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 20075298765
do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2011 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Publication 1345,** Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶ S24000000 TRAINING Date ▶ 01/01/2012

ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So

Detail Sheet 2011

Name: BEN A BAYLOR & PAT N HARPER **ID:** 221-02-0752

Description: 1040 WKT1 TP MEDICARE

Type	Amount
PART B	1,335.
PART D	426.
Total	1,761.

Detail Sheet

2011

Name: BEN A BAYLOR & PAT N HARPER **ID:** 221-02-0752

Description: SCH A LINE 6 PROP TAXES ON PRINCIPAL RES

Type	Amount
COUNTY	378.
CITY	120.
Total	498.

US 1040 Three - Year Tax Summary 2011

Name: BEN A BAYLOR & PAT N HARPER **SSN:** 221-02-0752

Gross Income	2009	2010	2011
Wages and salaries			
Interest and dividends			1,565.
Business income			
Sale of assets - gain or loss			737.
Pension and IRA distributions			37,142.
Rents, royalties, etc			
Unemployment and social security			11,659.
Other income			1,200.
Total gross income			52,303.
Adjustments to Income			
Adjusted gross income			52,303.
Itemized or Standard Deductions			
Medical expense deduction			11,201.
Taxes			1,982.
Interest			2,164.
Contributions			1,401.
Miscellaneous deductions			
Other itemized deductions			1,200.
Total deductions			17,948.
Exemptions			11,100.
Taxable Income	0	0	23,255.
Tax (2011 - 1040, line 44)	0	0	2,394.
Alternative minimum tax			
Other taxes			
Credits and Payments			
Credits			
Withholding			2,380.
EIC and Additional Child Tax Credit			
Estimated tax payments			
Other payments			
Total credits and payments			2,380.
Tax liability after credits			2,394.
Estimated tax penalty			
Refund or (Balance Due)			(14.)
Federal marginal tax bracket	0.0 %	0.0 %	15.0 %
State refund or (balance due)			
1st resident state refund (balance due)			NJ
2nd resident state refund (balance due)			
1st part-year state refund (balance due)			
2nd part-year state refund (balance due)			
1st nonresident state refund (balance due)			
2nd nonresident state refund (balance due)			
3rd nonresident state refund (balance due)			
4th nonresident state refund (balance due)			
5th nonresident state refund (balance due)			

NOTES FOR 2011:

US Schedule A — Sales Tax Worksheet — 2011

Name: BEN A BAYLOR & PAT N HARPER   SSN: 221-02-0752

1	Federal AGI		52,303.	
2	Nontaxable income listed on tax return			
a	Nontaxable interest			
b	Social security	8,369.		
c	Combat pay			
d	Income on Forms 4970 and 4972			
e	Nontaxable part of IRA, pension, or annuity distributions, not including rollovers		8,369.	
3	Other nontaxable income			
a				
b				
c				
d				
e				
4	**Income for sales tax chart**		60,672.	
1	Enter the taxpayer's state of residency for 2011			IN
	If the taxpayer was a part-year resident, enter the dates resided in this state ________ to ________			
	State sales tax from the applicable table			861.
2	Did you live Alaska, Arizona, Arkansas, California (Los Angeles County only), Colorado, Georgia, Illinois, Louisiana, Missouri, New York State, North Carolina, South Carolina, Tennessee, Utah or Virginia in 2011?			
	[X] **No.** Line 2 should be -0-.			
	[ ] **Yes.** Enter the letter (A - D) for the optional local sales tax table you want to use			
	Local sales tax from the applicable table			
3	Did your locality impose a local general sales tax in 2011? Residents of California and Nevada, see the Schedule A instructions.			
	[X] **No.** Go to line 7.			
	[ ] **Yes.** Enter the local general sales tax rate. If the rate is 2.5%, enter 2.5			
4	Did you enter -0- on line 2 above?			
	[ ] **No.** Skip to line 6.			
	[ ] **Yes.** Enter the state general sales tax rate from the table headed by the state in the Schedule A instructions. Enter 6.5% as 6.5			
5	Divide line 3 by line 4			
6	Did you enter -0- on line 2 above?			
	[ ] **No.** Multiply line 2 by line 3.			
	[ ] **Yes.** Multiply line 1 by line 5			
7	Total of lines 1 and 6 - prorated for part-year residents			861.
8	General sales tax paid on specified items. Motor vehicles - If the tax rate is higher than the general sales tax rate, only include the amount of tax at the general sales tax rate. Aircraft, boats, homes, including mobile and prefabricated, or home building materials - Only deductible if the sales tax charged is at the federal sales tax rate			
9	**Total sales tax using the sales tax chart**			861.
10	**Sales tax using actual receipts**			
11	**Sales tax deduction for Schedule A, line 5**			861.

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