US 1040 Main Information Sheet 2011

PRINTED 11/27/2011

	Taxpayer	Spouse
SSN	231-02-0752	
Birth	02/14/1939	
Death		
Day Phone	602-555-1111	
Evening		
Cell or Fax		
PIN	12345	

PAUL D AUSTIN

128 LONE OAK ROAD
PLUCKEMIN NJ 07978-

Email

Taxpayer Occupation MACHINIST

Spouse Occupation

Filing Status MARRIED FILING SEPARATE

Preparer ID:

Preparation Fee:

Date:

Preparer:

Preparer's Use: 1 2 3 4 5 6

Time in return min.

Recap of 2011 Income Tax Return

Earned Income	22,876.	**Federal Tax**	3,596.
Federal AGI	38,211.	**Withholding**	5,011.
Taxable Income	23,657.	**Refund/(Due)**	808.
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				

US 1040, 1040A, 1040EZ, 1040NR Income Worksheet 2011

Name: PAUL D AUSTIN **SSN:** 231-02-0752

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			
Railroad tier 1 received this year	7,368.		
Total	7,368.		7,368.
Medicare to Schedule A	1,157.		
Federal tax withheld	750.		

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 32,592.
+ tax-exempt interest: ______ and excluded income from American Samoa (Form 4563) or Puerto Rico: ______ + 50% of the benefits received: 3,684. ..... 36,276.

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** 6,263.

Modified AGI	36,276.		
$34,000 ($44,000)	34,000.		
Subtract	2,276.	X 85%=	1,935.

Minimum 50% of the benefits received or $4,500 ($6,000 married filing jointly) ..... 3,684.
Add ..... **B** 5,619.
Taxable social security and railroad retirement tier 1. Minimum of A or B ..... 5,619.

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			

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: PAUL D AUSTIN	Last name	**Your social security number** 231-02-0752
If a joint return, spouse's first name and initial	Last name	**Spouse's social security no.** 232-02-0752
Home address (number and street). If you have a P.O. box, see instructions. 128 LONE OAK ROAD	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. ▶ LINDSEY AUSTIN
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: 1
No. of children on 6c who: lived with you: 0
did not live with you due to divorce or separation (see instr.): 0
Dependents on 6c not entered above: 0

If more than four dependents, see instr. and check here ▶ ☐

c Dependents: (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.)

d Total number of exemptions claimed — Add numbers on lines above ▶ 1

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	22,876.
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	124.
b	Qualified dividends	9b 124.		
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	68.
14	Other gains or (losses). Attach Form 4797		14	
15a	IRA distributions 15a	b Taxable amount	15b	838.
16a	Pensions and annuities 16a 9,397.	b Taxable amount	16b	8,686.
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	
D 20a	Social security benefits 20a 7,368.	b Taxable amount	20b	5,619.
21	Other income. List type and amount (see instr.)		21	
22	Combine the amounts in the far right column for lines 7 through 21. This is your **total income** ▶		22	38,211.

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	38,211.

Tax and Credits

38	Amount from line 37 (adjusted gross income)			38	38,211.
39a	Check if: [X] You were born before Jan. 2, 1947, [ ] Blind. [ ] Spouse was born before Jan. 2, 1947, [ ] Blind. Total boxes checked ▶ 39a 1				
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b [X]				
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)			40	10,854.
41	Subtract line 40 from line 38			41	27,357.
42	Exemptions. Multiply $3,700 by the number on line 6d			42	3,700.
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-			43	23,657.
44	Tax (see instructions). Check if any tax is from: a [ ] Form(s) 8814 b [ ] Form 4972 c [ ] 962 election			44	3,096.
45	Alternative minimum tax (see instructions). Attach Form 6251			45	
46	Add lines 44 and 45 ▶			46	3,096.
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	3,096.

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	500.
60	Other taxes. Enter code(s) from instructions			60	
61	Add lines 55 through 60. This is your total tax ▶			61	3,596.

Payments

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	5,011.		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	5,011.

Refund

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid			73	1,415.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here ▶ [X]			74a	808.
▶ b	Routing number ▶ c Type: [ ] Checking [ ] Savings				
▶ d	Account number				
75	Amount of line 73 you want applied to your 2012 estimated tax ▶	75	607.		

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	
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.

Your signature	Date	Your occupation	Daytime phone number
		MACHINIST	432-555-1111
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	

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

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.	

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: PAUL D AUSTIN
Your social security no. 231-02-0752

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1	1,157.		
	2	Enter amount from Form 1040, line 38 ... 2 38,211.				
	3	Multiply line 2 by 7.5% (.075)	3	2,866.		
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	
Taxes You Paid	5	State and local **(check only one box):** a [X] Income taxes, **or** b [ ] General sales taxes	5	1,521.		
	6	Real estate taxes (see instructions)	6	2,012.		
	7	Personal property taxes	7	125.		
	8	Other taxes. List type and amount ▶	8			
	9	Add lines 5 through 8			9	3,658.
Interest You Paid	10	Home mortgage interest & points reported to you on Form 1098	10	4,677.		
	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	819.		
	14	Investment interest. Attach Form 4952 if required. (See inst.)	14			
	15	Add lines 10 through 14			15	5,496.
Gifts to Charity	16	Gifts by cash or check. If you made any gift of $250 or more, see instructions	16	1,700.		
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			
	18	Carryover from prior year	18			
	19	Add lines 16 through 18			19	1,700.
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 ▶			28	
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	10,854.
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ [ ]				

Name: PAUL D AUSTIN SSN: 231-02-0752

Medical Expenses **Medical miles:** 1 X .165 =

Insurance premiums paid (not pre-tax)			Medicare from 1040 worksheet		1,157.
Taxpayer			Remainder from worksheets		
Spouse			Taxpayer		
Qualified long term care contracts			Spouse		
Taxpayer			Self-employed health insurance		
Spouse			Taxpayer		
Other medical expenses			Spouse		
			Amount from additional worksheets		
			Total		1,157.

Cash Contributions

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

CHURCH	1,700.		
		From Schedules K-1	
		Amount from additional worksheets	
		Total	1,700.

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

		Schedules K-1	
		Amount from additional worksheets	
		Total	

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

		From Forms 8283	
		Amount from additional worksheets	
From Schedules K-1		**Total**	

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	19,106.	
This year's 50% organization cash contributions allowed		1,700.
30% of adjusted gross income	11,463.	
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	7,642.	
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		1,700.

US Schedule D — Schedule D Tax Worksheet — 2011

Name: PAUL D AUSTIN **SSN:** 231-02-0752

1	Taxable income from Form 1040, line 43, Form 1040NR, line 40, Form 1040A, line 27, or from the Foreign Earned Income Tax Worksheet					23,657.
2	Qualified dividends from Form 1040, line 9b, Form 1040A, line 9b, or Form 1040NR, line 10b		124.			
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-			124.		
7	Smaller of line 15 or line 16 of Schedule D		68.			
8	Smaller of line 3 or line 4					
9	Subtract line 8 from line 7. If -0- or less, enter -0-			68.		
10	Add lines 6 and 9				192.	
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-					192.
14	Subtract line 13 from line 1. If -0- or less, enter -0-					23,465.
15	Smaller of line 1 or $68,000 if married filing jointly or qualifying widow(er); $34,000, if single or married filing separately; $45,550 if head of household			23,657.		
16	Smaller of line 14 or line 15			23,465.		
17	Subtract line 10 from line 1. If -0- or less, enter -0-		23,465.			
18	Larger of line 16 or line 17				23,465.	
19	Subtract line 16 from line 15				192.	
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					3,096.
34	Add lines 23, 29, 32, and 33					3,096.
35	Tax on line 1 amount					3,126.
36	**Tax on all taxable income.** Smaller of lines 34 or 35					3,096.

 USSCHD$3

W-2 DETAIL REPORT - 2011

Employer	EIN	TP|SP	Gross Wages	Federal With.	FICA	Medicare	St	State Wages	State With.	Locality	Local With.
JOHNSON PRECISION TOOL A	22-5030752	X	22876	2617	961	332	NJ	22876	1521		
			22876	2617	961	332		22876	1521		

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.
UNITED STATES RAILRO	15-6020752	T	7		1561NJ		9397		E 711	8686	15397	10005
DAVIDSON BANK AND TR	22-8020752	T	7	X	83NJ		838	838		838		
					1644		10235	838	711	9524	15397	10005

Note. Skip this page if you are not filing this form to (1) report a disposition or change in use of your main home for which you claimed the credit in 2008, 2009, or 2010, or (2) repay the credit.

Name shown on return	Your social security number
PAUL D AUSTIN	231-02-0752

Part III Disposition or Change in Use of Main Home for Which the Credit Was Claimed

11 Enter the date you disposed of, or ceased using as your main home, the home for which you claimed the credit (MM/DD/YYYY) (see instructions) ▶

12 If you meet the following conditions, check here ▶ ☐
I (or my spouse if married) am, or was, a member of the uniformed services or Foreign Service, or an employee of the intelligence community. I sold the home, or it ceased to be my main home, in connection with Government orders for qualified official extended duty service. No repayment of the credit is required (see instructions). Stop here.

13 Check the box below that applies to you. See the instructions for the definition of "related person."

- **a** ☐ I sold (including through foreclosure) the home to a person who is not related to me and had a gain on the sale (as figured in Part V below). Go to Part IV below.
- **b** ☐ I sold (including through foreclosure) the home to a person who is not related to me and did not have a gain on the sale (as figured in Part V below). No repayment of the credit is required. Stop here.
- **c** ☐ I sold the home to a related person OR I gave the home to someone other than my spouse (or ex-spouse as part of my divorce settlement). Go to Part IV below.
- **d** ☐ I converted the entire home to a rental or business use OR I still own the home but no longer use it as my main home. Go to Part IV below.
- **e** ☐ I transferred the home to my spouse (or ex-spouse as part of my divorce settlement). The full name of my ex-spouse is ▶
  The responsibility for repayment of the credit is transferred to your spouse or ex-spouse. Stop here.
- **f** ☐ My home was destroyed, condemned, or sold under threat of condemnation and I had a gain (see instructions).
- **g** ☐ My home was destroyed, condemned, or sold under threat of condemnation and I did not have a gain (see instructions).
- **h** ☐ The taxpayer who claimed the credit died in 2011. No repayment of the credit is required of the deceased taxpayer. If you are filing a joint return for 2011 with the deceased taxpayer, see instructions. Otherwise, stop here.

Part IV Repayment of Credit Claimed for 2008, 2009, or 2010

14	Enter the amount of the credit you claimed on Form 5405 for 2008, 2009, or 2010. See instructions if you filed a joint return for the year you claimed the credit or you checked the box on line 13f or 13g	14	7,500.
15	If you purchased the home in 2008, enter the amount of the credit you repaid with your 2010 return. Otherwise, enter -0-	15	500.
16	Subtract line 15 from line 14. If you checked the box on line 13f or 13g, see instructions. If you checked the box on line 13a, go to line 17. Otherwise, skip line 17 and go to line 18	16	7,000.
17	Enter the gain on the disposition of your main home (from line 25 below)	17	
18	**Amount of the credit to be repaid.** See instructions	18	500.

Next: Enter the amount from line 18 on your 2011 Form 1040, line 59b, or Form 1040NR, line 58b.

Part V Form 5405 Gain or (Loss) Worksheet

Note: Complete this part only if your home was destroyed or you sold your home to someone who is not related to you (including a sale through condemnation or under threat of condemnation). See Pub. 523, Selling Your Home, for information on what to enter on lines 19, 20, and 22. But if you sold your home through condemnation, see chapter 1 in Pub. 544, Sales and Other Dispositions of Assets, for information on what to enter on lines 19 and 20.

19	Selling price of home, insurance proceeds, or gross condemnation award	19	
20	Selling expenses (including commissions, advertising and legal fees, and seller-paid loan charges) or expenses in getting the condemnation award	20	
21	Subtract line 20 from line 19. This is the amount realized on the sale of the home	21	
22	Adjusted basis of home sold (from line 13 of Worksheet 1 in Pub. 523)	22	
23	Enter the first-time homebuyer credit claimed on Form 5405 **minus** the amount you repaid with your 2010 tax return	23	7,000.
24	Subtract line 23 from line 22. This is the adjusted basis for purposes of repaying the credit	24	
25	Subtract line 24 from line 21	25	

- If line 25 is more than -0-, you have a gain. Check the box on line 13a and complete Part IV. **However,** check the box on line 13f (instead of the box on line 13a) if your home was destroyed or you sold the home through condemnation or under threat of condemnation. Then complete Part IV if you purchased the home in 2008 or you purchased the home in 2009 and the event occurred in 2009.
- If line 25 is -0- or less, check the box on line 13b of Form 5405. However, if your home was destroyed or you sold the home through condemnation or under threat of condemnation, check the box on line 13g instead. You do not have to repay the credit.

Form **8888**

Department of the Treasury
Internal Revenue Service

Allocation of Refund (Including Bond Purchases)

▶ **See separate instructions**
▶ **Attach your income tax return.**

OMB No. 1545-0074

2011

Attachment Sequence No. **56**

Name(s) shown on return: PAUL D AUSTIN

Your social security number: 231-02-0752

Part I Direct Deposit

Complete this party if you want us to directly deposit a portion of your refund to one or more accounts.

1a	Amount to be deposited in first account	**1a**	608.
b	Routing number 062005690 ▶ **c** [X] Checking [ ] Savings		
d	Account number 00578965542		
2a	Amount to be deposited in second account	**2a**	
b	Routing number ▶ **c** [ ] Checking [ ] Savings		
d	Account number		
3a	Amount to be deposited in third account	**3a**	
b	Routing number ▶ **c** [ ] Checking [ ] Savings		
d	Account number		

Part II U.S. Series I Savings Bond Purchases

Complete this part if you want to buy bonds with a portion of your refund.

! CAUTION If a name is entered on line 5c or 6c below, co-ownership will be assumed unless the beneficiary box is checked. See the instructions for more details.

4	Amount to be used for bond purchases for yourself (and your spouse, if filing jointly)	**4**	200.
5a	Amount to be used to buy bonds for yourself, your spouse, **or** someone else	**5a**	
b	Enter the owner's name (First then Last) for the bond registration		
c	If you would like to add a co-owner or beneficiary, enter their name here (First then Last). If beneficiary, also check here ▶ [ ]		
6a	Amount to be used to buy bonds for yourself, your spouse, **or** someone else	**6a**	
b	Enter the owner's name (First Last) for the bond registration		
c	If you would like to add a co-owner or beneficiary, enter their name here (First then Last). If beneficiary, also check here ▶ [ ]		

Part III Paper Check

Complete this part if you want a portion of your refund to be sent to you as a check.

7	Amount to be refunded by check	**7**	

Part IV Total Allocation of Refund

8	Add lines 1a, 2a, 3a, 4, 5a, 6a, and 7. The total must equal the overpayment shown on your tax return	**8**	808.

For Paperwork Reduction Act Notice, see your tax return instructions. Form **8888** (2011)

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) ▶ 20075220123310000013

Taxpayer's name	Social security number
PAUL D AUSTIN	231-02-0752
Spouse's name	Spouse's social security number

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	38,211.
2	Total tax (Form 1040, line 61; Form 1040A, line 35; Form 1040EZ, line 10)	2	3,596.
3	Federal income tax withheld (Form 1040, line 62; Form 1040A, line 36; Form 1040EZ, line 7)	3	5,011.
4	Refund (Form 1040, line 74a; Form 1040A, line 43a; Form 1040EZ, line 11; Form 1040-SS, Part I, line 12a)	4	808.
5	Amount you owe (Form 1040, line 76; Form 1040A, line 45; Form 1040EZ, line 12)	5	

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

[X] 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

US 1040 Three - Year Tax Summary 2011

Name: PAUL D AUSTIN **SSN:** 231-02-0752

Gross Income	**2009**	**2010**	**2011**
Wages and salaries			22,876.
Interest and dividends			124.
Business income			
Sale of assets - gain or loss			68.
Pension and IRA distributions			9,524.
Rents, royalties, etc			
Unemployment and social security			5,619.
Other income			
Total gross income			38,211.
Adjustments to Income			
Adjusted gross income			38,211.
Itemized or Standard Deductions			
Medical expense deduction			
Taxes			3,658.
Interest			5,496.
Contributions			1,700.
Miscellaneous deductions			
Other itemized deductions			
Total deductions			10,854.
Exemptions			3,700.
Taxable Income	0	0	23,657.
Tax (2011 - 1040, line 44)	0	0	3,096.
Alternative minimum tax			
Other taxes			500.
Credits and Payments			
Credits			
Withholding			5,011.
EIC and Additional Child Tax Credit			
Estimated tax payments			
Other payments			
Total credits and payments			5,011.
Tax liability after credits			3,596.
Estimated tax penalty			
Refund or (Balance Due)			1,415.
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: PAUL D AUSTIN SSN: 231-02-0752

1	Federal AGI		38,211.	
2	Nontaxable income listed on tax return			
a	Nontaxable interest			
b	Social security	1,749.		
c	Combat pay			
d	Income on Forms 4970 and 4972			
e	Nontaxable part of IRA, pension, or annuity distributions, not including rollovers	711.	2,460.	
3	Other nontaxable income			
a				
b				
c				
d				
e				
4	**Income for sales tax chart**		40,671.	
1	Enter the taxpayer's state of residency for 2011			NJ
	If the taxpayer was a part-year resident, enter the dates resided in this state ____ to ____			
	State sales tax from the applicable table			596.
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			596.
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**			596.
10	**Sales tax using actual receipts**			
11	**Sales tax deduction for Schedule A, line 5**			596.

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