

**US 1040**

**IRA Rollover Explanation**

**2011**

DIRECT ROLLOVER OF 11,755 FROM YALE SECURITY IRA TO MERRILL LYNCH

**US 1040** **Schedule A - Line 21** **Unreimbursed Employee Business Expenses** **2011**

Type of unreimbursed employee business expenses	Amount
EDUCATOR EXPENSES	375.
LESS AGI ADJUSTMENT LIMIT	(250.)
	125.

## US Schedule D

## Capital Gain or Loss Transactions Worksheet

2011

\* Check if 28% rate gain or (loss)

(a) Description of property	T S J	*	(b) Code	(c) Date acquired	(d) Date sold	(e) Sales price	(f) Cost or other basis	(g) Adjustments to Gain or Loss	S / L
100 PURDUE	T		I	07/01/2001	03/10/2011	8,859.	10,123.	(1,299.)	L
100 RUST	T			11/01/1998	09/23/2011	1,700.	3,200.	(1,500.)	L
150 RIO	T			07/15/2008	06/01/2011	10,675.	9,543.	1,132.	L
65 RIDER	T			IN/HE/RIT	12/30/2011	5,663.	7,222.	(1,559.)	L
						26,897.	30,088.	(3,225.)	

PRINTED 12/08/2011

KARL R KENT  
 KARA B BRYANT  
1068 RIVERMEADE DR  
PLUCKEMIN NJ 07978-

	<b>Taxpayer</b>	<b>Spouse</b>
SSN	<u>211-02-0752</u>	<u>212-02-0752</u>
Birth	<u>07/28/1940</u>	<u>01/15/1950</u>
Death		
Day Phone	<u>259-555-1111</u>	
Evening		
Cell or Fax		
PIN	<u>12345</u>	<u>12345</u>

Email \_\_\_\_\_  
 Taxpayer Occupation CLERK Spouse Occupation SCHOOL TEACHER  
 Filing Status MARRIED FILING JOINT

TAMARA	THOMAS	05/08/2006	214-02-0752	GRANDCHILD	12	1
KENDRA		03/13/1988	213-02-0752	DAUGHTER	12	1
KERRI	BRYANT	03/17/1948	210-02-0752	SISTER	12	1

Preparer ID: \_\_\_\_\_ Preparation Fee: \_\_\_\_\_ Date: \_\_\_\_\_

Preparer: \_\_\_\_\_

Preparer's Use:	1 _____	4 _____	Time in
	2 _____	5 _____	return
	3 _____	6 _____	min.

Recap of 2011 Income Tax Return

Earned Income	<u>44,161.</u>	Federal Tax	<u>2,582.</u>
Federal AGI	<u>74,240.</u>	Withholding	<u>5,603.</u>
Taxable Income	<u>40,456.</u>	Refund/(Due)	<u>2,173.</u>
EIC		Tax Bracket	<u>15.0 %</u>

State	<u>NJ</u>	_____	_____	_____	_____
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				

Name: KARL R KENT & KARA B BRYANT

SSN: 211-02-0752

**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 .....	13,682.		
Railroad tier 1 received this year .....			
Total .....	13,682.		13,682.
Medicare to Schedule A .....	1,985.		
Federal tax withheld .....	360.		

**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 62,878.

+ tax-exempt interest: 338. and excluded income from American Samoa (Form 4563) or

Puerto Rico: \_\_\_\_\_ + 50% of the benefits received: 6,841. .....

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 .....	<b>A</b>	11,630.	
Modified AGI .....		70,057.	
\$34,000 (\$44,000) .....		44,000.	
Subtract .....		26,057.	
	X 85%=	22,148.	
Minimum 50% of the benefits received or \$4,500 (\$6,000 married filing jointly) .....		6,000.	
Add .....	<b>B</b>	28,148.	
<b>Taxable social security and railroad retirement tier 1.</b> Minimum of A or B .....			11,630.

**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 .....			
<b>Taxable benefits using the lump-sum election method</b> .....			

Name: **KARL R KENT & KARA B BRYANT** SSN: **211-02-0752**

<b>Student Loan Interest (Postsecondary Education)</b>	Taxpayer	Spouse	Total
1 Amount paid in 2011. See instructions for limitations and definition of qualified student loan interest. Total column is limited to \$2,500 .....		268.	268.
Modified AGI for this computation including excluded income from Forms 2555 (EZ) and 4563, excluded income from Puerto Rico, and excluded adoption benefits from Form 8839, line 30 <u>74,508.</u>			
Married filing separately and a dependent of another cannot take this deduction. The interest deduction phases out when modified AGI exceeds \$60,000 (\$120,000 married filing jointly) and is -0- when AGI exceeds \$75,000 (\$150,000 married filing jointly).			
<b>2 Student loan interest deduction</b> .....		268.	268.
<b>Educator Expenses - Elementary and Secondary</b>	Taxpayer	Spouse	Total
Amount of unreimbursed classroom expenses, such as books, supplies, computer equipment and related software, other equipment, and supplementary materials used by the eligible educator in the classroom, up to \$250. Amounts over \$250 should be listed on Schedule A, Job Expenses, subject to 2% of AGI		375.	250.
<b>Education Savings Accounts (ESAs) and QTPs</b>		Taxpayer	Spouse
1 Excess contributions .....			
2 Taxable distributions .....			

**Tuition and Fees as an AGI Deduction**

In most cases, tuition and fees will create a better income tax result by using Form 8863, Education Credits. The same rules for qualified tuition and fees apply to the credit and the deduction.

No deduction is allowed if filing Form 1040NR or married filing separately.

Some things to consider

Form 8863, Education Credits

- 40% of the American Opportunity Credit is refundable and is reduced once the AGI reaches \$80,000 single (\$160,000, married filing jointly), and is -0- when the AGI reaches \$90,000 single (\$180,000, married filing jointly).
- The nonrefundable education credits are reduced once the AGI reaches \$50,000, single (\$100,000, married filing jointly), and is -0- when the AGI reaches \$60,000, single (\$120,000, married filing jointly).
- The American Opportunity Credit, if not reduced, can be as much as \$2,500 credit per student.
- The Lifetime Learning Credit, if not reduced, is limited to \$2,000.

Tuition and Fees as an AGI Deduction

- The deduction is limited to \$4,000, if AGI does not exceed \$65,000, single (\$130,000 married filing jointly).
- The deduction is limited to \$2,000, if AGI exceeds \$65,000, single (\$130,000 married filing jointly).
- The deduction is -0- when AGI exceeds \$80,000, single (\$160,000 married filing jointly).

Student's name	Social security number	Qualified expenses
KARL KENT	211-02-0752	
KARA BRYANT	212-02-0752	
TAMARA THOMAS	214-02-0752	
KENDRA KENT	213-02-0752	
KERRI BRYANT	210-02-0752	
1 Total qualified expense .....		
2 Modified AGI .....		74,240.
3 Tuition and fees deduction .....		(Spouse amount: )

**US Child Tax Credit, Federal Extension Payment, and Carryovers Worksheet 2011**

Name: **KARL R KENT & KARA B BRYANT**

SSN: **211-02-0752**

**Child Tax Credit (CTC)**

1	\$1,000 X <input type="text" value="1"/> qualifying children		1,000.
2	Modified AGI is AGI plus excluded income from Forms 2555 (EZ) and 4563, and excluded income from Puerto Rico	74,240.	
3	Modified AGI limitation \$110,000 married filing jointly; \$55,000 married filing separately; all others \$75,000	110,000.	
4	Subtract line 3 from line 2. If -0-, go to line 7		
5	Round up to next \$1,000		
6	Multiply line 5 by 5%		
7	<b>Maximum child tax credit.</b> Subtract line 6 from line 1. You cannot take the credit if this amount is -0-		1,000.
8	Amount from Form 1040, line 46, Form 1040A, line 28, or Form 1040NR, line 43	5,184.	
9	Credits for foreign tax, dependent care, elderly, education, retirement savings, adoption, mortgage interest, DC first-time homebuyers and residential energy	1,894.	
<b>CTC Worksheet for Forms 8396, Mortgage Interest Credit, Form 8839, Adoption Credit, Form 8859, DC First-time Homebuyers Credit, and Form 5695, Residential Energy Credits</b>			
1	Foreign tax credit + dependent care credit + elderly credit + education credit + retirement savings credit		
2	Amount from line 7 above		
3	Social security or RR tier 1 + Medicare		
4	Form 1040, line 27 + line 59; or Form 1040NR, line 54 + uncollected social security and Medicare taxes listed on W2		
5	Add lines 3 and 4		
6	Earned income credit and excess FICA/RRTA		
7	Subtract line 6 from line 5		
8	Maximum child tax credit, line 7 above, minus the larger of line 7 of this worksheet or Form 8812, line 6. This is the child tax credit for the purpose of figuring Forms 5695, 8396, 8839 and 8859. Use this amount in place of the child tax credit amount asked for on these forms		
9	Total of adoption credit, mortgage interest credit, DC first-time homebuyer credit, and residential energy credits as refigured.		
10	Add lines 1 and 9		
10	Subtract line 9 from line 8		3,290.
11	<b>Child tax credit</b>		1,000.

**Amount paid with Federal extension (Form 4868 or 2350)**

**Carryovers from 2011 to 2012**

1	Section 179 expense disallowed, Form 4562, accumulative total														
2	Net operating loss from 2011 only, Form 1045 Amt. carried forward from 2010. Listed on Form 1040, line 21, or Form 1040NR, line 21														
3	2011 charitable contributions. Organization limit:														
		<table border="1"> <tr> <th colspan="2">Cash or other property</th> <th colspan="2">Capital Gain</th> </tr> <tr> <td>50%</td> <td>30%</td> <td>30%</td> <td>20%</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Cash or other property		Capital Gain		50%	30%	30%	20%					
Cash or other property		Capital Gain													
50%	30%	30%	20%												
4	Investment interest expense, Form 4952, accumulative total														
5	Foreign tax credit from 2011 only, Form 1116. Enter amount carried back, if any														
7	Mortgage interest credit, Form 8396:														
		<table border="1"> <tr> <td>2009</td> <td>2010</td> <td>2011</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </table>	2009	2010	2011										
2009	2010	2011													
8	General business credits for 2011 only, Form 3800														
9	Form 8844, for 2011 only. Enter amount carried back														
10	DC first-time homebuyer credit, Form 8859, cumulative total														
11	Prior year minimum tax credit, Form 8801, cumulative total														
12	AMT limited qualified electric vehicle credit from 2011 only														
13	Nonrecaptured net section 1231 losses														
		<table border="1"> <tr> <td>2007</td> <td>2008</td> <td>2009</td> <td>2010</td> <td>2011</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	2007	2008	2009	2010	2011								
2007	2008	2009	2010	2011											

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

Your first name and initial **KARL R KENT** Last name \_\_\_\_\_ **Your social security number** 211-02-0752

If a joint return, spouse's first name and initial **KARA B BRYANT** Last name \_\_\_\_\_ **Spouse's social security no.** 212-02-0752

Home address (number and street). If you have a P.O. box, see instructions. **1068 RIVERMEADE DR** 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**  
 1  Single 4  Head of household (with qualifying person). (See instructions.)  
 2  Married filing jointly (even if only one had income) If the qualifying person is a child but not your dependent, enter this child's name here. ▶  
 3  Married filing separately. Enter spouse's SSN above and full name here. ▶ 5  Qualifying widow(er) with dependent child

**Exemptions**

6a	<input checked="" type="checkbox"/> <b>Yourself.</b> If someone can claim you as a dependent, <b>do not</b> check box 6a			<b>Boxes checked on 6a and 6b</b> 2
b	<input checked="" type="checkbox"/> <b>Spouse</b>			
<b>c Dependents:</b>				
<b>(1) First name Last name (2) Dependent's social security no. (3) Dependent's relationship to you (4) <input checked="" type="checkbox"/> if child under age 17 qualifying for child tax credit (see instr.)</b>				
	TAMARA THOMAS	214-02-0752	GRANDCHILD	<b>No. of children on 6c who:</b> ■ lived with you 3 ■ did not live with you due to divorce or separation (see instr.) 0 Dependents on 6c not entered above 0
	KENDRA KENT	213-02-0752	DAUGHTER	
	KERRI BRYANT	210-02-0752	SISTER	
d	Total number of exemptions claimed			<b>Add numbers on lines above</b> 5

**Income**

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	41,951.
8a	Taxable interest. Attach Schedule B if required	8a	5,816.
b	Tax-exempt interest. <b>Do not</b> include on line 8a	8b	338.
9a	Ordinary dividends. Attach Schedule B if required	9a	232.
b	Qualified dividends	9b	232.
10	Taxable refunds, credits, or offsets of state and local income taxes	10	437.
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	2,378.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	(3,000.)
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	12,593.
b	Taxable amount	15b	838.
16a	Pensions and annuities	16a	19,825.
b	Taxable amount	16b	19,490.
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	1,050.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	2,550.
20a	Social security benefits	20a	13,682.
b	Taxable amount	20b	11,630.
21	Other income. List type and amount (see instr.) <b>GAMBLING WINNINGS</b>	21	1,200.
22	Combine the amounts in the far right column for lines 7 through 21. This is your <b>total income</b> ▶	22	84,572.

**Adjusted Gross Income**

23	Educator expenses	23	250.
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	168.
28	Self-employed SEP, SIMPLE, and qualified plans	28	
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	46.
31a	Alimony paid b Recipient's SSN ▶ <b>215-02-0752</b>	31a	3,600.
32	IRA deduction	32	6,000.
33	Student loan interest deduction	33	268.
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	10,332.
37	Subtract line 36 from line 22. This is your <b>adjusted gross income</b> ▶	37	74,240.



Tax and Credits

Table with 3 columns: Line number, Description, and Amount. Includes lines 38-55 for tax and credits.

Standard Deduction for-

- People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.
All others:

Single or Married filing separately, \$5,800
Married filing jointly or Qualifying widow(er), \$11,600
Head of household, \$8,500

Other Taxes

Table with 3 columns: Line number, Description, and Amount. Includes lines 56-61 for other taxes.

Payments

If you have a qualifying child, attach Schedule EIC.

Table with 3 columns: Line number, Description, and Amount. Includes lines 62-72 for payments.

Refund

Direct deposit? See instructions

Table with 3 columns: Line number, Description, and Amount. Includes lines 73-75 for refund.

Amount You Owe

Table with 3 columns: Line number, Description, and Amount. Includes lines 76-77 for amount you owe.

Third Party Designee

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

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.

Paid Preparer's Use Only

Print/Type preparer's name, Preparer's signature, Date, Check if self-employed, PTIN, Firm's name, Firm's address, Firm's EIN, 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

KARL R KENT & KARA B BRYANT

Your social security no.  
211-02-0752

<b>Medical and Dental Expenses</b>	<b>Caution.</b> Do not include expenses reimbursed or paid by others.					
	1 Medical and dental expenses (see instructions) .....	1	9,475.			
	2 Enter amount from Form 1040, line 38 ..... 2   74,240.					
	3 Multiply line 2 by 7.5% (.075) .....	3	5,568.			
4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- .....				4	3,907.	
<b>Taxes You Paid</b>	5 State and local ( <b>check only one box</b> ):					
	a <input checked="" type="checkbox"/> Income taxes, or	5	2,403.			
	b <input type="checkbox"/> General sales taxes					
	6 Real estate taxes (see instructions).....	6	1,511.			
	7 Personal property taxes .....	7	624.			
	8 Other taxes. List type and amount ▶ .....					
	9 Add lines 5 through 8 .....				9	4,538.
	<b>Interest You Paid</b>	10 Home mortgage interest & points reported to you on Form 1098	10	3,164.		
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				
<b>Note.</b> Your mortgage interest deduction may be limited (see instructions).		12				
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	3,164.	
<b>Gifts to Charity</b>	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions .....	16	2,475.			
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You <b>must</b> attach Form 8283 if over \$500 .....	17				
	18 Carryover from prior year.....	18				
	19 Add lines 16 through 18 .....				19	2,475.
<b>Casualty and Theft Losses</b>	20 Casualty or theft loss(es). Attach Form 4684. (See instructions.) .....				20	
<b>Job Expenses and Certain Miscellaneous Deductions</b>	21 Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ▶ SEE STMT .....	21	125.			
	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	125.			
	25 Enter amount from Form 1040, line 38 ..... 25   74,240.					
	26 Multiply line 25 by 2% (.02) .....	26	1,485.			
27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0- .....				27		
<b>Other Miscellaneous Deductions</b>	28 Other - from list in the inst. List type and amount ..... ▶ GAMBLING LOSSES .....		1,200.		28	1,200.
<b>Total Itemized Deductions</b>	29 Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40 .....	29			29	15,284.
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here .....					

For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule A (Form 1040) 2011

**US Schedule A**

**Itemized Deduction Detail Worksheet**

**2011**

Name: **KARL R KENT & KARA B BRYANT**

SSN: **211-02-0752**

Medical Expenses		Medical miles: 618 X .165 = 101.98	
Insurance premiums paid (not pre-tax)		Medicare from 1040 worksheet..... 1,985.	
Taxpayer .....	600.	Remainder from worksheets	
Spouse .....	600.	Taxpayer .....	
Qualified long term care contracts		Spouse .....	
Taxpayer .....		Self-employed health insurance	
Spouse .....		Taxpayer .....	
Other medical expenses		Spouse .....	
DOCTOR BILLS	1,653.		
HOSPITAL BILLS	3,200.		
PRESCRIPTION DRUGS	965.		
PRESCRIPTION EYEGLASSES	210.	Amount from additional worksheets .....	
		<b>Total</b> .....	<b>9,475.</b>

Cash Contributions		Other Charitable miles: X .14 =	
<b>50% Limit Organizations</b>			
CHURCH	1,650.		
VARIOUS	225.		
MILLSAP ELEMENTARY	250.		
		From Schedules K-1 .....	
		Amount from additional worksheets .....	
		<b>Total</b> .....	<b>2,125.</b>

30% Limit Organizations		Charitable miles: X .14 =	
SALVATION ARMY	350.	Schedules K-1 .....	
		Amount from additional worksheets .....	
		<b>Total</b> .....	<b>350.</b>

Other Than Cash Contributions		50% Limit Organizations	
		From Forms 8283 .....	
		Amount from additional worksheets .....	
From Schedules K-1		<b>Total</b> .....	

30% Limit Capital gain property donated to 50% limit organizations.			
		From Forms 8283 .....	
From Schedules K-1		<b>Total</b> .....	

30% Limit Not capital gain property donated to 30% limit organizations.			
		From Forms 8283 .....	
From Schedules K-1		<b>Total</b> .....	

20% Limit Organization Capital gain property donated to 30% limit organizations.			
		From Forms 8283 .....	
From Schedules K-1		<b>Total</b> .....	

	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								

Contribution Carryovers			
<b>Contributions allowed this year</b>			
50% of adjusted gross income .....		37,120.	
This year's 50% organization cash contributions allowed .....			2,125.
30% of adjusted gross income .....		22,272.	
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 .....			350.
30% organizations cash and other property carryover .....			
20% of adjusted gross income .....		14,848.	
This year's capital gain contributions to 30% organizations limited to 20% .....			
30% capital gain carryover limited to 20% AGI .....			
<b>Total contributions allowed this year</b> .....			<b>2,475.</b>

**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 **KARL R KENT & KARA B BRYANT** Your social security number **211-02-0752**

<b>Part I</b>		<b>Amount</b>
<b>1</b>	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 ▶ <u>CHARLES CAMPBELL</u> <u>219020752</u> <u>1523 NORTH CURRY RD PLUCKEMIN NJ 0</u> <u>KENDALL FEDERAL CRED</u> <u>ZYX INVESTMENTS</u> <u>ZYX INVESTMENTS</u>	<u>2,782.</u> <u>456.</u> <u>123.</u> <u>2,455.</u>
<b>2</b>	Add the amounts on line 1	<b>5,816.</b>
<b>3</b>	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	
<b>4</b>	Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶	<b>5,816.</b>
<b>Note.</b> If line 4 is over \$1,500, you must complete Part III.		<b>Amount</b>

<b>Part II</b>		<b>Amount</b>
<b>5</b>	List name of payer ▶ <u>ZYX INVESTMENTS</u>	<u>232.</u>
<b>6</b>	Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶	<b>232.</b>
<b>Note.</b> If line 6 is over \$1,500, you must complete Part III.		

<b>Part III</b>		<b>Yes</b>	<b>No</b>
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.			
<b>7a</b>	At any time during 2011, did you have a financial interest in or signature authority (or other authority that is comparable to signature authority) over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? See instructions for exceptions and filing requirements for Form TD F 90-22.1		X
<b>8</b>	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.		X

For Paperwork Reduction Act Notice, see your tax return instructions. Schedule B (Form 1040A or 1040) 2011

KARA B BRYANT  
TRANSCRIPTION

212-02-0752  
561410

X

X

X

2,719.

2,719.

2,719.

224.

2,719.

2,719.

117.

341.  
2,378.

2,378.

01/02/2006

420

10000

X

X

X

X

PAPER

49.

PRINTER CARTRIDGE

68.

**SCHEDULE D  
(Form 1040)**

**Capital Gains and Losses**

OMB No. 1545-0074

**2011**

Department of the Treasury  
Internal Revenue Service (99)

▶ **Attach to Form 1040 or Form 1040NR.** ▶ **See Instructions for Schedule D (Form 1040).**  
▶ **Use Form 8949 to list your transactions for lines 1, 2, 3, 8, 9, and 10.**

Attachment  
Sequence No. **12**

Name(s) shown on return  
**KARL R KENT & KARA B BRYANT**

Your social security number  
**211-02-0752**

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

<b>Note:</b> Please round and use whole dollars on this form.	<b>(e)</b> Sales price from Form(s) 8949, line 2, column (e)	<b>(f)</b> Cost or other basis from Form(s) 8949, line 2, column (f)	<b>(g)</b> Adjustments to gain or loss from Form(s) 8949, line 2, column (g)	<b>(h) Gain or (loss)</b> Combine columns (e) (f), and (g)
<b>1</b> Short-term totals from all Forms 8949 with box A checked on Part I		( )		
<b>2</b> Short-term totals from all Forms 8949 with box B checked on Part I		( )		
<b>3</b> Short-term totals from all Forms 8949 with box C checked on Part I		( )		
<b>4</b> Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				<b>4</b>
<b>5</b> Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				<b>5</b>
<b>6</b> Short-term capital loss carryover. Enter the amount, if any, from line 8 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				<b>6</b> ( )
<b>7 Net short-term capital gain or (loss).</b> Combine lines 1 through 6 in column (h)				<b>7</b>

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

<b>Note:</b> Please round and use whole dollars on this form.	<b>(e)</b> Sales price from Form(s) 8949, line 2, column (e)	<b>(f)</b> Cost or other basis from Form(s) 8949, line 2, column (f)	<b>(g)</b> Adjustments to gain or loss from Form(s) 8949, line 2, column (g)	<b>(h) Gain or (loss)</b> Combine columns (e) (f), and (g)
<b>8</b> Long-term totals from all Forms 8949 with box A checked on Part II	21234.	( 22866. )	-35.	-1667.
<b>9</b> Long-term totals from all Forms 8949 with box B checked on Part II	5663.	( 7222. )		-1559.
<b>10</b> Long-term totals from all Forms 8949 with box C checked on Part II		( )		
<b>11</b> Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				<b>11</b>
<b>12</b> Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				<b>12</b>
<b>13</b> Capital gain distributions. See the instructions				<b>13</b> 69.
<b>14</b> Long-term capital loss carryover. Enter the amount, if any, from line 13 of your <b>Capital Loss Carryover Worksheet</b> in the instructions				<b>14</b> ( )
<b>15 Net long-term capital gain or (loss).</b> Combine lines 8 through 14 in column (h). Then go to Part III on page 2				<b>15</b> -3157.

For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule D (Form 1040) 2011

**Part III Summary**

16 Combine lines 7 and 15 and enter the result ..... 16 ( 3,157. )

- If line 16 is a **gain**, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below.
- If line 16 is a **loss**, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.
- If line 16 is **zero**, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22.

17 Are lines 15 and 16 **both** gains?

- Yes.** Go to line 18.
- No.** Skip lines 18 through 21, and go to line 22.

18 Enter the amount, if any, from line 7 of the **28% Rate Gain Worksheet** in the instructions ..... 18

19 Enter the amount, if any, from line 18 of the **Unrecaptured Section 1250 Gain Worksheet** in the instructions ..... 19

20 Are lines 18 and 19 **both** zero or blank?

- Yes.** Complete Form 1040 through line 43, or Form 1040NR through line 41. Then complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the Instructions for Form 1040, line 44 (or in the Instructions for Form 1040NR, line 42). **Do not** complete lines 21 and 22 below.
- No.** Complete Form 1040 through line 43, or Form 1040NR through line 41. Then complete the **Schedule D Tax Worksheet** in the instructions. **Do not** complete lines 21 and 22 below.

21 If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the **smaller** of:

- The loss on line 16 or
- (\$3,000), or if married filing separately, (\$1,500) ..... 21 ( 3,000. )

**Note.** When figuring which amount is smaller, treat both amounts as positive numbers.

22 Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?

- Yes.** Complete Form 1040 through line 43, or Form 1040NR through line 41. Then complete the **Qualified Dividends and Capital Gain Tax Worksheet** in the Instructions for Form 1040, line 44 (or in the Instructions for Form 1040NR line 42).
- No.** Complete the rest of Form 1040 or Form 1040NR.



**US Schedule D**

**Schedule D Tax Worksheet**

**2011**

Name: **KARL R KENT & KARA B BRYANT**

SSN: **211-02-0752**

1	Taxable income from Form 1040, line 43, Form 1040NR, line 40, Form 1040A, line 27, or from the Foreign Earned Income Tax Worksheet			40,456.
2	Qualified dividends from Form 1040, line 9b, Form 1040A, line 9b, or Form 1040NR, line 10b	232.		
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-		232.	
7	Smaller of line 15 or line 16 of Schedule D			
8	Smaller of line 3 or line 4			
9	Subtract line 8 from line 7. If -0- or less, enter -0-			
10	Add lines 6 and 9		232.	
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-			232.
14	Subtract line 13 from line 1. If -0- or less, enter -0-			40,224.
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	40,456.		
16	Smaller of line 14 or line 15	40,224.		
17	Subtract line 10 from line 1. If -0- or less, enter -0-	40,224.		
18	Larger of line 16 or line 17		40,224.	
19	Subtract line 16 from line 15		232.	
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			5,184.
34	Add lines 23, 29, 32, and 33			5,184.
35	Tax on line 1 amount			5,221.
36	<b>Tax on all taxable income.</b> Smaller of lines 34 or 35			5,184.

Name: KARL R KENT & KARA B BRYANT

SSN: 211-02-0752

**Capital Loss Carryovers from This Year to Next Year**

1	Amount from Form 1040, line 41, or Form 1040NR, line 38	58,956.
2	Loss shown on Schedule D, line 21 as a positive amount	3,000.
3	Combine lines 1 and 2. If -0- or less, enter -0-	61,956.
4	Smaller line 2 or line 3	3,000.
5	Loss shown on Schedule D, line 7 as a positive amount	
6	Gain, if any, shown on Schedule D, line 15	
7	Add lines 4 and 6	3,000.
8	<b>Short-term capital loss carryover.</b> Subtract line 7 from line 5. If -0- or less, enter -0-	
9	Loss shown on Schedule D, line 15 as a positive amount	3,157.
10	Gain, if any, shown on Schedule D, line 7	
11	Subtract line 5 from line 4. If -0- or less, enter -0-	3,000.
12	Add lines 10 and 11	3,000.
13	<b>Long-term capital loss carryover.</b> Subtract line 12 from line 9. If -0- or less, enter -0-	157.

**Sale of Your Home**

1 Date main home was sold: \_\_\_\_\_ Acquisition date: \_\_\_\_\_

2 If Form 8828 is also needed for this sale, check here

3 If any part of the main home was ever rented out or used for business, see instructions.

If part of the sale is a sale of business property, report the business portion using a depreciation wkst, and report personal portion below and skip line 9.

4 Selling price of home \_\_\_\_\_

5 Selling expenses \_\_\_\_\_

6 Amount realized \_\_\_\_\_

7 Adjusted basis of home sold \_\_\_\_\_

8 **Gain on the sale.** If -0- or less, enter -0- \_\_\_\_\_

9 Depreciation claimed on property after 05/06/1997 \_\_\_\_\_

10 Subtract line 9 from line 8. If -0- or less, enter -0- \_\_\_\_\_

11 Aggregate number of days of nonqualified use after 12/31/2008 \_\_\_\_\_

12 Number of days the taxpayer owned the property \_\_\_\_\_

13 Divide the amount on line 11 by the amount on line 12 \_\_\_\_\_

14 Gain allocated to nonqualified use \_\_\_\_\_

15 **Gain eligible for exclusion** \_\_\_\_\_

16a Did you (and your spouse if filing a joint return) own and occupy the property as your main home for a total of a least 2 years of the 5 year period before the sale?  Yes  No

b If "No", did you sell the home due to a change in place of employment, health or other unforeseen circumstances?  Yes  No

c If you are an unmarried surviving spouse, the sale occurred no later than 2 years after the date of the other spouse's death, the ownership and use requirements for joint filers were met immediately before the date of such death, and there was no sale or exchange of a main home by either spouse which qualified for the exclusion during the 2-year period ending on the date of the other spouse's death, check here  Yes

17 Maximum exclusion \_\_\_\_\_

18 Smaller of line 15 or line 17. If you are reporting the sale on the installment method, enter this amount on Form 6252, line 15 \_\_\_\_\_

19 **Taxable gain.** \_\_\_\_\_

a You must enter this amount on Schedule D or Form 6252 \_\_\_\_\_  
This gain is to be considered:  short-term  long-term.

b Transferred to Form 4797, Part III \_\_\_\_\_

**Information for Separate State Returns - Default is to the Taxpayer.**

	Federal	Taxpayer	Spouse
1 Short term			
2 Short term loss based on joint return			
3 Long term	(3,157.)	(3,157.)	
4 Long term loss based on joint return	3,000.	3,000.	
5 Schedule D result (line 16 or line 21)	(3,000.)	(3,000.)	
6 Short term loss carryover			
7 Long term loss carryover	157.	157.	

**SCHEDULE E  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Supplemental Income and Loss**  
(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041. ▶ See separate instructions.

OMB No. 1545-0074

**2011**

Attachment  
Sequence No. **13**

Name(s) shown on return **KARL R KENT & KARA B BRYANT** Your social security no. **211-02-0752**

**A** Did you make any payments in 2011 that would require you to file Form(s) 1099? (see instructions) Yes  No   
**B** If "Yes," did you or will you file all required Forms 1099? Yes  No

**Part I Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use **Schedule C** or **C-EZ** (see instructions). If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

**Caution.** For each rental property listed on line 1, check the box in the last column only if you owned that property as a member of a qualified joint venture (QJV) reporting income not subject to self-employment tax.

1	Physical address of each property-street, city, state, zip	Type-from list below	2	For each rental real estate property listed, report the number of days rented at fair rental value and days with personal use. See instructions.	Fair Rental	Personal	QJV
					Days	Use Days	
A	BLACK JACK PRODUCTION 1001 YUKON D	6					
B							
C							

**Type of Property:**

- 1 Single Family Residence      3 Vacation/Short-Term Rental      5 Land      7 Self-Rental
- 2 Multi-Family Residence      4 Commercial      6 Royalties      8 Other (describe)

Income:	Properties						
			A	B	C		
<b>3a</b> Merchant card and third party payments. For 2011, enter -0-	<b>3a</b>						
<b>3b</b> Payments not reported to you on like 3a	<b>3b</b>	1,050.					
<b>4</b> Total not including amounts on line 3a that are income (see instructions)	<b>4</b>	1,050.					
<b>Expenses:</b>							
<b>5</b> Advertising	<b>5</b>						
<b>6</b> Auto and travel (see instructions)	<b>6</b>						
<b>7</b> Cleaning and maintenance	<b>7</b>						
<b>8</b> Commissions	<b>8</b>						
<b>9</b> Insurance	<b>9</b>						
<b>10</b> Legal and other professional fees	<b>10</b>						
<b>11</b> Management fees	<b>11</b>						
<b>12</b> Mortgage interest paid to banks, etc. (see instructions)	<b>12</b>						
<b>13</b> Other interest	<b>13</b>						
<b>14</b> Repairs	<b>14</b>						
<b>15</b> Supplies	<b>15</b>						
<b>16</b> Taxes	<b>16</b>						
<b>17</b> Utilities	<b>17</b>						
<b>18</b> Depreciation expense or depletion	<b>18</b>						
<b>19</b> Other (list) ▶	<b>19</b>						
<b>20</b> Total expenses. Add lines 5 through 19	<b>20</b>						
<b>21</b> Subtract line 20 from line 4. If result is a (loss), see instructions to find out if you must file <b>Form 6198</b>	<b>21</b>	1,050.					
<b>22</b> Deductible rental real estate loss after limitation, if any, on <b>Form 8582</b> (see instructions)	<b>22</b>	( )	( )	( )	( )	( )	
<b>23a</b> Total of all amounts reported on line 3a for all rental properties	<b>23a</b>						
<b>b</b> Total of all amounts reported on line 3a for all royalty properties	<b>23b</b>						
<b>c</b> Total of all amounts reported on line 4 for all rental properties	<b>23c</b>						
<b>d</b> Total of all amounts reported on line 4 for all royalty properties	<b>23d</b>	1,050.					
<b>e</b> Total of all amounts reported on line 12 for all properties	<b>23e</b>						
<b>f</b> Total of all amounts reported on line 18 for all properties	<b>23f</b>						
<b>g</b> Total of all amounts reported on line 20 for all properties	<b>23g</b>						
<b>24</b> <b>Income.</b> Add positive amounts shown on line 21. <b>Do not</b> include any losses	<b>24</b>					1,050.	
<b>25</b> <b>Losses.</b> Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	<b>25</b>	( )	( )	( )	( )		
<b>26</b> <b>Total rental real estate and royalty income or (loss).</b> Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	<b>26</b>					1,050.	

For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule E (Form 1040) 2011

Name of person with <b>self-employment</b> income (as shown on Form 1040) KARA B BRYANT	Social security number of person with <b>self-employment</b> income ▶	212-02-0752
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**Section B - Long Schedule SE**

**Part I Self-Employment Tax**

**Note.** If your only income subject to self-employment tax is **church employee income**, see instructions. Also see instructions for the definition of church employee income.

**A** If you are a minister, member of a religious order, or Christian Science practitioner **and** you filed Form 4361, but you had \$400 or more of **other** net earnings from self-employment, check here and continue with Part I

<b>1 a</b> Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. <b>Note.</b> Skip lines 1a and 1b if you use the farm optional method (see instructions)	<b>1a</b>	
<b>b</b> If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Y	<b>1b</b>	
<b>2</b> Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report. <b>Note.</b> Skip this line if you use the nonfarm optional method (see instructions)	<b>2</b>	2,378.
<b>3</b> Combine lines 1a, 1b, and 2	<b>3</b>	2,378.
<b>4 a</b> If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3 <b>Note.</b> If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.	<b>4a</b>	2,196.
<b>b</b> If you elect one or both of the optional methods, enter the total of lines 15 and 17 here	<b>4b</b>	
<b>c</b> Combine lines 4a and 4b. If less than \$400, <b>stop</b> ; you do not owe self-employment tax. <b>Exception.</b> If less than \$400 and you had <b>church employee income</b> , enter -0- and continue ▶	<b>4c</b>	2,196.
<b>5 a</b> Enter your <b>church employee income</b> from Form W-2. See instructions for definition of church employee income	<b>5a</b>	
<b>b</b> Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-	<b>5b</b>	
<b>6</b> Add lines 4c and 5b	<b>6</b>	2,196.
<b>7</b> Maximum amount of combined wages and self-employment earnings subject to social security tax or the 4.2% portion of the 5.65% railroad retirement (tier 1) tax for 2011	<b>7</b>	106,800 00
<b>8 a</b> Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$106,800 or more, skip lines 8b through 10, and go to line 11	<b>8a</b>	13,817.
<b>b</b> Unreported tips subject to social security tax (from Form 4137, line 10)	<b>8b</b>	
<b>c</b> Wages subject to social security tax (from Form 8919, line 10)	<b>8c</b>	
<b>d</b> Add lines 8a, 8b, and 8c	<b>8d</b>	13,817.
<b>9</b> Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 ▶	<b>9</b>	92,983.
<b>10</b> Multiply the <b>smaller</b> of line 6 or line 9 by 10.4% (.104)	<b>10</b>	228.
<b>11</b> Multiply line 6 by 2.9% (.029)	<b>11</b>	64.
<b>12 Self-employment tax.</b> Add lines 10 and 11. Enter here and on <b>Form 1040, line 56</b> , or <b>Form 1040NR, line 54</b>	<b>12</b>	292.
<b>13 Deduction for employer-equivalent portion of self-employment tax.</b> Add the two following amounts. • 59.6% (.596) of line 10. • One-half of line 11. Enter the result here and on <b>Form 1040, line 27</b> , or <b>Form 1040NR, line 27</b>	<b>13</b>	168.

**Part II Optional Methods To Figure Net Earnings** (see instructions)

<b>Farm Optional Method.</b> You may use this method <b>only</b> if (a) your gross farm income <sup>1</sup> was not more than \$6,720 or (b) your net farm profits <sup>2</sup> were less than \$4,851.		
<b>14</b> Maximum income for optional methods	<b>14</b>	4,480 00
<b>15</b> Enter the <b>smaller</b> of: two-thirds (2/3) of gross farm income <sup>1</sup> (not less than zero) or \$4,480. Also include this amount on line 4b above	<b>15</b>	
<b>Nonfarm Optional Method.</b> You may use this method <b>only</b> if (a) your net nonfarm profits <sup>3</sup> were less than \$4,851 and also less than 72.189% of your gross nonfarm income <sup>4</sup> ; <b>and</b> (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. <b>Caution.</b> You may use this method no more than five times.		
<b>16</b> Subtract line 15 from line 14	<b>16</b>	
<b>17</b> Enter the <b>smaller</b> of: two-thirds (2/3) of gross nonfarm income <sup>4</sup> (not less than zero) or the amount on line 16. Also include this amount on line 4b above	<b>17</b>	

<sup>1</sup> From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.  
<sup>2</sup> From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A - minus the amount you would have entered on line 1b had you not used the optional method.

<sup>3</sup> From Sch. C, line 31; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.  
<sup>4</sup> From Sch. C, line 7; Sch. C-EZ, line 1d; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

W-2 DETAIL REPORT - 2011

Employer	EIN	TP SP	Gross Wages	Federal With.	FICA	Medicare	St	State Wages	State With.	Locality	Local With.
JEFFERSON INDEPENDENT SC	25-5020752	X	13817	987	580	200	NJ	13817	693		
AMERICUS PETROLEUM	25-6020752	X	28134	2176	1306	451	NJ	28134	1674		
			-----	-----	-----	---		-----	-----		
			41951	3163	1886	651		41951	2367		

**US Estimated Tax Payments Made for the Current Tax Year 2011**

Name: KARL R KENT & KARA B BRYANT

SSN: 211-02-0752

**Federal Estimated Tax Payments**

See note below	Date of payment	Amount of payment	Towards 04/15/2011 payment	Towards 06/15/2011 payment	Towards 09/15/2011 payment	Towards 01/15/2012 payment
From last year	04/15/2011	200.				
<b>D</b> 04/15 <b>1</b>	04/14/2011	100.				
<b>U</b> 06/15 <b>2</b>						
<b>E</b> 09/15 <b>3</b>	09/18/2011	100.				
01/15 <b>4</b>						
* Pay date						
Totals		400.				

\* Fill in the pay date on Form 2210, page 1.

**State Estimated Tax Payments**

\*\*The day listed in the date of payment section is the due date for most state estimated tax payments. If your state has different due dates, disregard the date suggested. If payment 1 was paid on or before the date due for payment 1, enter it in payment 1, etc.

\* Check the \* column if payment 4 was paid before 01/01/2012.

**Taxpayer, Joint, or Combined State Return**

\*\* Date of Payment

State	Credit from last year	04/15/2011 Amount 1	06/15/2011 Amount 2	09/15/2011 Amount 3	01/15/2012 Amount 4	*	Total
NJ							

NJ	State and/or local balance due from previous years' returns paid in 2011. Include amounts paid with a 2010 extension paid in 2011 .....						
	State and/or local balance due from previous years' returns paid in 2011. Include amounts paid with a 2010 extension paid in 2011 .....						
NJ	Last state estimate payment for 2010 paid in 2011 (due January 15, 2011) .....						
	Last state estimate payment for 2010 paid in 2011 (due January 15, 2011) .....						

**Spouse Filing Married Separate State Tax Return or Second Full Year Resident State**

\*\* Date of Payment

State	Credit from last year	04/15/2011 Amount 1	06/15/2011 Amount 2	09/15/2011 Amount 3	01/15/2012 Amount 4	*	Total

## W-2G DETAIL REPORT - 2011

Payer	EIN	TP SP	Federal Withheld	Gross Winnings	State Withheld	Losses
LOTTERY BOARD	26-7020752	X		1200	36	2250
				-----	--	-----
				1200	36	2250

## 1099G DETAIL REPORT - 2011

Payer	T S	Unemployment Received	Repaid	Withholding Federal	State
INDIANA UNEMPLOYMENT COMMISSIO	X	2550		120	
		----		---	
		2550		120	



1099 MISCELLANEOUS REPORT - 2011

Payer	ID number	Rent	Roy	Prizes	Fed With	Fish Boat	Med	Nonemp Comp	Sub Paymts	Crop Ins	EPP	Sect 409A	St	St With	St	St With
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TRANSCRIPTION:

PRATT MEDICAL C 26-0020752

1637

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1637

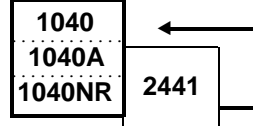
1099-R DETAIL REPORT - 2011

Payer	EIN	T S	Box 7	IRA/SEP Simple	Fed. With.	State With.	Gross	1099R Taxable	Roll/ Exclude	Net	Cost	Cost Bal.
SAULK TRUST COMPANY	26-2020752	T	7	X		NJ	838	838		838		
YALE SECURITY IRA	26-3020752	T	G	X		NJ	11755		R 11755			
DEFENSE FINANCE AND	11-2020752	T	7			NJ	1200	1200		1200		
STILLMAN PENSION FUN	26-4020752	T	7		1715	NJ	18625		E 335	18290	5864	5194
					-----		-----	-----	-----	-----	-----	-----
					1715		32418	2038	12090	20328	5864	5194

**Child and Dependent Care Expenses**

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

▶ See separate instructions.



Name(s) shown on return  
**KARL R KENT & KARA B BRYANT**

Your social security number  
**211-02-0752**

**Part I** **Persons or Organizations Who Provided the Care -** You must complete this part.  
(If you have more than two care providers, see the instructions.)

1 (a) Care provider's name	(b) Address (number, street, apt. no., city, state, and ZIP code)	(c) Identifying number (SSN or EIN)	(d) Amount paid (see instructions)
MARYVILLE DAY CARE	128 MENIO ST PLUCKEMIN NJ 07978-	26-8020752	1,100.

Did you receive dependent care benefits?	No	→	Complete only Part II below.
	Yes	→	Complete Part III on page 2.

**Caution.** If the care was provided in your home, you may owe employment taxes. If you do, you cannot file Form 1040A. For details, see the instructions for Form 1040, line 59, or Form 1040NR, line 58.

**Part II** **Credit for Child and Dependent Care Expenses**

**2** Information about your **qualifying person(s)**. If you have more than two qualifying persons, see the instructions.

(a) Qualifying person's name		(b) Qualifying person's social security number	(c) Qualified expenses you incurred and paid in 2011 for the person listed in column (a)
First	Last		
TAMARA	THOMAS	214-02-0752	1,100.

<b>3</b> Add the amounts in column (c) of line 2. <b>Do not</b> enter more than \$3,000 for one qualifying person or \$6,000 for two or more persons. If you completed Part III, enter the amount from line 31	<b>3</b>	1,100.																																																										
<b>4</b> Enter your <b>earned income</b> . See instructions	<b>4</b>	31,088.																																																										
<b>5</b> If married filing jointly, enter your spouse's earned income (if your spouse was a student or was disabled, see the instructions); <b>all others</b> , enter the amount from line 4	<b>5</b>	16,027.																																																										
<b>6</b> Enter the <b>smallest</b> of line 3, 4, or 5	<b>6</b>	1,100.																																																										
<b>7</b> Enter the amount from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37	<b>7</b>	74,240.																																																										
<b>8</b> Enter on line 8 the decimal amount shown below that applies to the amount on line 7																																																												
<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"><b>If line 7 is:</b></td> <td style="width: 50%;"><b>If line 7 is:</b></td> </tr> <tr> <td style="text-align: center;"> <table border="1" style="width: 100%;"> <thead> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> </thead> <tbody> <tr><td>\$0-15,000</td><td></td><td>.35</td></tr> <tr><td>15,000-17,000</td><td></td><td>.34</td></tr> <tr><td>17,000-19,000</td><td></td><td>.33</td></tr> <tr><td>19,000-21,000</td><td></td><td>.32</td></tr> <tr><td>21,000-23,000</td><td></td><td>.31</td></tr> <tr><td>23,000-25,000</td><td></td><td>.30</td></tr> <tr><td>25,000-27,000</td><td></td><td>.29</td></tr> <tr><td>27,000-29,000</td><td></td><td>.28</td></tr> </tbody> </table> </td> <td style="text-align: center;"> <table border="1" style="width: 100%;"> <thead> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> </thead> <tbody> <tr><td>\$29,000-31,000</td><td></td><td>.27</td></tr> <tr><td>31,000-33,000</td><td></td><td>.26</td></tr> <tr><td>33,000-35,000</td><td></td><td>.25</td></tr> <tr><td>35,000-37,000</td><td></td><td>.24</td></tr> <tr><td>37,000-39,000</td><td></td><td>.23</td></tr> <tr><td>39,000-41,000</td><td></td><td>.22</td></tr> <tr><td>41,000-43,000</td><td></td><td>.21</td></tr> <tr><td>43,000-No limit</td><td></td><td>.20</td></tr> </tbody> </table> </td> </tr> </table>	<b>If line 7 is:</b>	<b>If line 7 is:</b>	<table border="1" style="width: 100%;"> <thead> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> </thead> <tbody> <tr><td>\$0-15,000</td><td></td><td>.35</td></tr> <tr><td>15,000-17,000</td><td></td><td>.34</td></tr> <tr><td>17,000-19,000</td><td></td><td>.33</td></tr> <tr><td>19,000-21,000</td><td></td><td>.32</td></tr> <tr><td>21,000-23,000</td><td></td><td>.31</td></tr> <tr><td>23,000-25,000</td><td></td><td>.30</td></tr> <tr><td>25,000-27,000</td><td></td><td>.29</td></tr> <tr><td>27,000-29,000</td><td></td><td>.28</td></tr> </tbody> </table>	Over	But not over	Decimal amount is	\$0-15,000		.35	15,000-17,000		.34	17,000-19,000		.33	19,000-21,000		.32	21,000-23,000		.31	23,000-25,000		.30	25,000-27,000		.29	27,000-29,000		.28	<table border="1" style="width: 100%;"> <thead> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> </thead> <tbody> <tr><td>\$29,000-31,000</td><td></td><td>.27</td></tr> <tr><td>31,000-33,000</td><td></td><td>.26</td></tr> <tr><td>33,000-35,000</td><td></td><td>.25</td></tr> <tr><td>35,000-37,000</td><td></td><td>.24</td></tr> <tr><td>37,000-39,000</td><td></td><td>.23</td></tr> <tr><td>39,000-41,000</td><td></td><td>.22</td></tr> <tr><td>41,000-43,000</td><td></td><td>.21</td></tr> <tr><td>43,000-No limit</td><td></td><td>.20</td></tr> </tbody> </table>	Over	But not over	Decimal amount is	\$29,000-31,000		.27	31,000-33,000		.26	33,000-35,000		.25	35,000-37,000		.24	37,000-39,000		.23	39,000-41,000		.22	41,000-43,000		.21	43,000-No limit		.20	<b>8</b>	x . 0.20
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<b>9</b> Multiply line 6 by the decimal amount on line 8. If you paid 2010 expenses in 2011, see the instructions	<b>9</b>	220.																																																										
<b>10</b> Tax liability limit. Enter the amount from the Credit Limit Worksheet in the instructions	<b>10</b>	5,180.																																																										
<b>11</b> <b>Credit for child and dependent care expenses.</b> Enter the <b>smaller</b> of line 9 or line 10 here and on Form 1040, line 48; Form 1040A, line 29; or Form 1040NR, line 46.	<b>11</b>	220.																																																										

For Paperwork Reduction Act Notice, see the instructions.

# Residential Energy Credits

**2011**

Department of the Treasury  
Internal Revenue Service

▶ **See instructions.**  
▶ **Attach to Form 1040 or Form 1040NR.**

Attachment  
Sequence No. **158**

Name(s) shown on return

**KARL R KENT & KARA B BRYANT**

Your social security number

**211-02-0752**

**Part I Nonbusiness Energy Property Credit**

**1a** Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions) ..... ▶

**1a**  **Yes**  **No**

**Caution:** If you checked the "No" box, you cannot claim the nonbusiness energy property credit. Do not complete Part I.

**b** Print the complete address of the main home where you made the qualifying improvements.

**Caution:** You can only have one main home at a time.

1068 RIVERMEADE DR

Number and street

Unit No.

PLUCKEMIN

City, State, and ZIP code

NJ 07978-

**c** Were any of these improvements related to the construction of this main home? ..... ▶

**1c**  **Yes**  **No**

**Caution:** If you checked the "Yes" box, you can only claim the nonbusiness energy property credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.

**2** Lifetime limitation. Amounts claimed in 2006, 2007, 2009, and 2010.

<b>a</b> Amount, if any, from line 12 of your 2006 Form 5695 .....	<b>2a</b>	
<b>b</b> Amount, if any, from line 15 of your 2007 Form 5695 .....	<b>2b</b>	
<b>c</b> Amount, if any, from line 11 of your 2009 Form 5695 .....	<b>2c</b>	
<b>d</b> Amount, if any, from line 11 of your 2010 Form 5695 .....	<b>2d</b>	

**e** Add lines 2a through 2d. If \$500 or more, **stop**; you cannot take the nonbusiness energy property credit

**2e**

**3** Qualified energy efficiency improvements (original use must begin with you and the component must reasonably be expected to last for at least 5 years; do not include labor costs) (see instructions)

**a** Insulation material or system specifically and primarily designed to reduce the heat loss or gain of your home that meets the prescriptive criteria established by the 2009 IECC .....

**3a** 175.

**b** Exterior doors that meet or exceed the Energy Star program requirements .....

**3b**

**c** Metal or asphalt roof that meets or exceeds the Energy Star program requirements and has appropriate pigmented coatings or cooling granules which are specifically and primarily designed to reduce the heat gain of your home .....

**3c**

**d** Exterior windows and skylights that meet or exceed the Energy Star program requirements .....

**3d** 7,450.

**e** Maximum amount of cost on which the credit can be figured .....

**3e** \$2,000

**f** If you claimed window expenses on your Form 5695 for 2006, 2007, 2009, or 2010, enter the amount from the Window Expense Worksheet (see instructions); otherwise enter -0- .....

**3f**

**g** Subtract line 3f from line 3e. If zero or less, enter -0- .....

**3g** 2,000.

**h** Enter the smaller of line 3d or line 3g .....

**3h** 2,000.

**4** Add lines 3a, 3b, 3c, and 3h .....

**4** 2,175.

**5** Multiply line 4 by 10% (.10) .....

**5** 218.

**6** Residential energy property costs (must be placed in service by you; include labor costs for onsite preparation, assembly, and original installation) (see instructions)

**a** Energy-efficient building property. Do not enter more than **\$300** .....

**6a**

**b** Qualified natural gas, propane, or oil furnace or hot water boiler. Do not enter more than **\$150** .....

**6b**

**c** Advanced main air circulating fan used in a natural gas, propane, or oil furnace. Do not enter more than **\$50** .....

**6c**

**7** Add lines 6a through 6c .....

**7**

**8** Add lines 5 and 7 .....

**8** 218.

**9** Maximum credit amount. (If you jointly occupied the home, see instructions) .....

**9** 500.

**10** Enter the amount, if any, from line 2e .....

**10**

**11** Subtract line 10 from line 9. If zero or less, **stop**; you cannot take the nonbusiness energy property credit .....

**11** 500.

**12** Enter the smaller of line 8 or line 11 .....

**12** 218.

**13** Limitation based on tax liability. Enter the amount from the Credit Limit Worksheet (see instructions) .....

**13** 3,508.

**14** **Nonbusiness energy property credit.** Enter the smaller of line 12 or line 13. Also include this amount on Form 1040, line 52, or Form 1040NR, line 49 .....

**14** 218.

# Alternative Minimum Tax - Individuals

Department of the Treasury  
Internal Revenue Service (99)

▶ See separate instructions.

**2011**  
Attachment  
Sequence No. **32**

▶ Attach to Form 1040 or Form 1040NR.

Name(s) shown on Form 1040 or Form 1040NR  
**KARL R KENT & KARA B BRYANT**

Your social security no.  
**211-02-0752**

<b>Part I Alternative Minimum Taxable Income</b> (See instructions for how to complete each line.)			
1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41 and go to line 2. Otherwise, enter the amount from Form 1040, line 38 and go to line 6. (If less than zero, enter as a negative amount.)	1	58,956.
2	Medical and dental. Enter the <b>smaller</b> of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	1,856.
3	Taxes from Schedule A (Form 1040), line 9	3	4,538.
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	5	
6	Skip this line. It is reserved for future use	6	
7	Tax refund from Form 1040, line 10 or line 21	7	( 437. )
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Alternative tax net operating loss deduction	11	( )
12	Interest from specified private activity bonds exempt from the regular tax	12	
13	Qualified small business stock (7% of gain excluded under section 1202)	13	
14	Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17	Disposition of property (difference between AMT and regular tax gain or loss)	17	
18	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19	Passive activities (difference between AMT and regular tax income or loss)	19	
20	Loss limitations (difference between AMT and regular tax income or loss)	20	
21	Circulation costs (difference between regular tax and AMT)	21	
22	Long-term contracts (difference between AMT and regular tax income)	22	
23	Mining costs (difference between regular tax and AMT)	23	
24	Research and experimental costs (difference between regular tax and AMT)	24	
25	Income from certain installment sales before January 1, 1987	25	( )
26	Intangible drilling costs preference	26	
27	Other adjustments, including income-based related adjustments	27	
28	<b>Alternative minimum taxable income.</b> Combine lines 1 through 27. (If married filing separately and line 28 is more than \$223,900, see instructions.)	28	64,913.

<b>Part II Alternative Minimum Tax (AMT)</b>																	
29	Exemption. (If you were under age 24 at the end of 2011, see instructions.)																
	<table style="width: 100%; border: none;"> <tr> <td style="width: 30%;"><b>IF your filing status is...</b></td> <td style="width: 30%;"><b>AND line 28 is not over...</b></td> <td style="width: 30%;"><b>THEN enter on line 29...</b></td> <td style="width: 10%;"></td> </tr> <tr> <td>Single or head of household</td> <td>\$112,500</td> <td>\$48,450</td> <td rowspan="3" style="font-size: 3em; vertical-align: middle;">}</td> </tr> <tr> <td>Married filing jointly or qualifying widow(er)</td> <td>150,000</td> <td>74,450</td> </tr> <tr> <td>Married filing separately</td> <td>75,000</td> <td>37,225</td> </tr> </table>	<b>IF your filing status is...</b>	<b>AND line 28 is not over...</b>	<b>THEN enter on line 29...</b>		Single or head of household	\$112,500	\$48,450	}	Married filing jointly or qualifying widow(er)	150,000	74,450	Married filing separately	75,000	37,225	29	74,450.
<b>IF your filing status is...</b>	<b>AND line 28 is not over...</b>	<b>THEN enter on line 29...</b>															
Single or head of household	\$112,500	\$48,450	}														
Married filing jointly or qualifying widow(er)	150,000	74,450															
Married filing separately	75,000	37,225															
	If line 28 is <b>over</b> the amount shown above for your filing status, see instructions.																
30	Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 33 and 35 and skip the rest of Part II	30															
31	<ul style="list-style-type: none"> <li>• If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter.</li> <li>• If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 54 here.</li> <li>• <b>All others:</b> If line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.</li> </ul>	31															
32	Alternative minimum tax foreign tax credit (see instructions)	32	4.														
33	Tentative minimum tax. Subtract line 32 from line 31	33															
34	Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Schedule J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Schedule J (see instructions)	34	5,180.														
35	<b>AMT.</b> Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35															

Declaration Control Number (DCN)

00 - 200752 - 00010 - 2

IRS Use Only - Do not write or staple in this space.

Form **8453**

**U.S. Individual Income Tax Transmittal  
for an IRS e-file Return**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

For the year January 1-December 31, 2011

**2011**

▶ See instructions.

Please print or type.

P R I N T  C L E A R L Y	Your first name and initial KARL R		Last name KENT	Your social security number 211-02-0752	
	If a joint return, spouse's first name and initial KARA B		Last name BRYANT	Spouse's social security no. 212-02-0752	
	Home address (number and street). If you have a P.O. box, see instructions. 1068 RIVERMEADE DR			Apt. no.	<b>Important!</b> You must enter your SSN(s) above.
	City, town or post office, state, and ZIP code (If a foreign address also complete spaces below.) PLUCKEMIN NJ 07978-				
	Foreign country name		Foreign province/county	Foreign postal code	

**FILE THIS FORM ONLY IF YOU ARE ATTACHING ONE OR MORE  
OF THE FOLLOWING FORMS OR SUPPORTING DOCUMENTS.**

Check the applicable box(es) to identify the attachments.

- Appendix A, Statement by Taxpayer Using the Procedures in Rev. Proc. 2009-20 to Determine a Theft Loss Deduction Related to a Fraudulent Investment Arrangement
- Form 1098-C, Contributions of Motor Vehicles, Boats, and Airplanes (or equivalent contemporaneous written acknowledgment)
- Form 2848, Power of Attorney and Declaration of Representative (or POA that states the agent is granted authority to sign the return)
- Form 3115, Application for Change in Accounting Method
- Form 3468 - attach a copy of the first page of NPS Form 10-168a, Historic Preservation Certification Application (Part 2 - Description of Rehabilitation), with an indication that it was received by the Department of the Interior or the State Historic Preservation Officer, together with proof that the building is a certified historic structure (or that such status has been requested)
- Form 4136 - attach the Certificate for Biodiesel and, if applicable, Statement of Biodiesel Reseller or a certificate from the provider identifying the product as renewable diesel and, if applicable, a statement from the reseller
- Form 5713, International Boycott Report
- Form 8283, Noncash Charitable Contributions, Section A, (if any statement or qualified appraisal is required) or Section B, Donated Property, and any related attachments (including any qualified appraisal or partnership Form 8283)
- Form 8332, Release / Revocation of Release of Claim to Exemption for Child by Custodial Parent (or certain pages from a divorce decree or separation agreement, that went into effect after 1984 and before 2009) (see instructions)
- Form 8858, Information Return of U.S. Persons With Respect to Foreign Disregarded Entities
- Form 8864 - attach the Certificate for Biodiesel and, if applicable, Statement of Biodiesel Reseller or a certificate from the provider identifying the product as renewable diesel and, if applicable, a statement from the reseller
- Form 8885, Health Coverage Tax Credit, and all required attachments
- Form 8949, Sales and Other Dispositions of Capital Assets, (or a statement with the same information), if you elect not to report your transactions electronically on Form 8949

**DO NOT SIGN THIS FORM.**

For Paperwork Reduction Act Notice, see the instructions.

Form **8453** (2011)

BCA

US8453\$1

Name: KARL R KENT & KARA B BRYANT

SSN: 211-02-0752

Traditional IRA

Were you covered by a retirement plan?  Yes  No  
 If married filing jointly, was your spouse covered by a retirement plan?  Yes  No

				Taxpayer	Spouse
<b>1</b>	Maximum modified AGI for deductible contributions				
	Filing status	Covered by a retirement plan?	Yes	No	
	1 or 4		\$66,000	No limit	
	2	Spouse covered by a plan	\$110,000		
	2	Spouse not covered by a plan		\$179,000	
	2	Neither spouse covered by a plan		No limit	
	3	Lived with spouse at anytime in 2011	\$10,000	No limit	
	3	Did not live with spouse in 2011	\$66,000	No limit	
	5		\$110,000	No limit	
				110,000.	110,000.
<b>2</b>	Modified AGI computation				
	Social security computation without IRA		69,216.		
	Taxable social security for this computation		11,630.		
	Modified income including taxable social security		84,572.		
<b>3</b>	Adjustments to income without IRA contribution		4,064.		
<b>4</b>	Modified AGI. Subtract line 3 from line 2			80,508.	80,508.
<b>5</b>	Line 1 minus line 4. If -0- or less, enter -0- on line 6			29,492.	29,492.
<b>6</b>	Line 5 times the applicable percentage from the instructions, rounded up to nearest \$10. Do not enter less than \$200, or more than \$5,000 (\$6,000 if age 50 or older).			6,000.	6,000.
<b>7</b>	Total wages and other earned income, minus any deductions on Form 1040, lines 27 and 28, or Form 1040NR, line 27. Do not reduce wages by any losses from self-employment		44,161.		
<b>8</b>	Maximum contribution based on earnings		12,000.		
<b>9</b>	Maximum allowable IRA contribution				6,000.
<b>10</b>	Enter IRA contributions for 2011 Do NOT enter more than \$5,000 (\$6,000 if age 50 or older) in either column				6,000.
<b>11</b>	Deductible IRA contributions. Smaller of lines 6, 7, 9, or 10				6,000.
<b>12</b>	Nondeductible IRA contributions				
<b>13</b>	Excess traditional IRA contributions				

Roth IRA

				Taxpayer	Spouse
<b>14</b>	Maximum modified AGI for allowable contributions				
	Filing status	Modified AGI			
	1 or 4	\$122,000			
	2 or 5	\$179,000			
	3	Lived with spouse at anytime in 2011	\$10,000		
	3	Did not live with spouse in 2011	\$122,000		
				179,000.	179,000.
<b>15</b>	Modified AGI. AGI + Forms 2555, 8815, and 4563 + Puerto Rico income + adoption expense exclusion minus IRA to Roth IRA rollovers			80,508.	80,508.
<b>16</b>	Line 14 minus line 15. If -0-, enter -0- on line 17			98,492.	98,492.
<b>17</b>	Maximum contribution allowed based on AGI			6,000.	
<b>18</b>	Maximum contribution based on earnings		6,000.		
<b>19</b>	Maximum allowable Roth IRA contribution			6,000.	
<b>20</b>	Enter Roth IRA contributions for 2011 Do NOT enter more than \$5,000 (\$6,000 if age 50 or older) in either column				
<b>21</b>	Excess Roth contributions				

## Education Credits (American Opportunity and Lifetime Learning Credits)

Department of the Treasury  
Internal Revenue Service (99)

▶ See separate instructions to find out if you are eligible to take the credits.  
▶ Attach to Form 1040 or Form 1040A.

**2011**

Attachment  
Sequence No. **50**

Name(s) shown on return <b>KARL R KENT &amp; KARA B BRYANT</b>	Your social security number <b>211-02-0752</b>
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**CAUTION** You cannot take both an education credit and the tuition and fees deduction (see Form 8917) for the same student for the same year.

### Part I American Opportunity Credit

**Caution:** You cannot take the American opportunity credit for more than 4 tax years for the same student.

1 (a) Student's name (as shown on page 1 of your tax return) First name Last name	(b) Student's social security number (as shown on page 1 of your tax return)	(c) Qualified expenses (see instr.). <b>Do not</b> enter more than \$4,000 for each student.	(d) Subtract \$2,000 from the amount in column (c). If zero or less, enter -0-.	(e) Multiply the amount in column (d) by 25% (.25)	(f) If column (d) is zero, enter the amount from column (c). Otherwise, add \$2,000 to the amount in column (e).
KENDRA KENT	213-02-0752	3,250.	1,250.	313.	2,313.
2 <b>Tentative American opportunity credit.</b> Add the amounts on line 1, column (f). If you are taking the lifetime learning credit for a different student, go to Part II; otherwise, go to Part III					<b>2</b> 2,313.

### Part II Lifetime Learning Credit

**Caution:** You cannot take the American opportunity credit and the lifetime learning credit for the same student in the same year.

3 (a) Student's name (as shown on page 1 of your tax return) First name Last name	(b) Student's social security number (as shown on page 1 of your tax return)	(c) Qualified expenses (see instructions)
KARA BRYANT	212-02-0752	318.
4 Add the amounts on line 3, column (c), and enter the total		<b>4</b> 318.
5 Enter the <b>smaller</b> of line 4 or \$ 10,000		<b>5</b> 318.
6 <b>Tentative lifetime learning credit.</b> Multiply line 5 by 20% (.20). If you have an entry on line 2, go to Part III; otherwise go to Part IV		<b>6</b> 64.

For Paperwork Reduction Act Notice, see your tax return instructions. Form **8863** (2011)



<b>Part III Refundable American Opportunity Credit</b>			
7	Enter the amount from line 2	7	2,313.
8	Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying widow(er)	8	180,000.
9	Enter the amount from Form 1040, line 38,* or Form 1040A, line 22	9	74,240.
10	Subtract line 9 from line 8. If zero or less, <b>stop</b> ; you cannot take any education credit	10	105,760.
11	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	11	20,000.
12	If line 10 is: <ul style="list-style-type: none"> <li>• Equal to or more than line 11, enter 1.000 on line 12</li> <li>• Less than line 11, divide line 10 by line 11. Enter the result as a decimal (rounded to at least three places)</li> </ul>	12	1.000
13	Multiply line 7 by line 12. <b>Caution:</b> If you were under age 24 at the end of the year <b>and</b> meet the conditions in the instructions, you <b>cannot</b> take the refundable American opportunity credit. Skip line 14, enter the amount from line 13 on line 15, and check this box <input type="checkbox"/>	13	2,313.
14	<b>Refundable American opportunity credit.</b> Multiply line 13 by 40% (.40). Enter the amount here and on Form 1040, line 66, or Form 1040A, line 43. Then go to line 15 below	14	925.

<b>Part IV Nonrefundable Education Credits</b>			
15	Subtract line 14 from line 13	15	1,388.
16	Enter the amount from line 6, if any. If you have no entry on line 6, skip lines 17 through 22, and enter the amount from line 15 on line 6 of the Credit Limit Worksheet (see instructions)	16	64.
17	Enter: \$122,000 if married filing jointly; \$61,000 if single, head of household, or qualifying widow(er)	17	122,000.
18	Enter the amount from Form 1040, line 38,* or Form 1040A, line 22	18	74,240.
19	Subtract line 18 from line 17. If zero or less, skip lines 20 and 21, and enter zero on line 22	19	47,760.
20	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	20	20,000.
21	If line 19 is: <ul style="list-style-type: none"> <li>• Equal to or more than line 20, enter 1.000 on line 21 and go to line 22</li> <li>• Less than line 20, divide line 19 by line 20. Enter the result as a decimal (rounded to at least three places)</li> </ul>	21	1.000
22	Multiply line 16 by line 21. Enter here and on line 1 of the Credit Limit Worksheet (see instructions)	22	64.
23	<b>Nonrefundable education credits.</b> Enter the amount from line 11 of the Credit Limit Worksheet (see instructions) here and on Form 1040, line 49, or Form 1040A, line 31	23	1,452.

\*If you are filing Form 2555,2555-EZ, or 4563, or you are excluding income from Puerto Rico, see Pub. 970 for the amount to enter.

X60 RWDUE 07/05/2008 06/00/2011  
KARL R KENT & KARA B BRYANT

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211-02-0752

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85 RIDER IN/HE/RIT 12/30/2011  
KARL R KENT & KARA B BRYANT

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7222. T  
211-02-0752

Department of the Treasury  
Internal Revenue Service

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

**2011**

Declaration Control Number (DCN) ▶ 00200752000101

Taxpayer's name KARL R KENT	Social security number 211-02-0752
Spouse's name KARA B BRYANT	Spouse's social security number 212-02-0752

**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	74,240.
2 Total tax (Form 1040, line 61; Form 1040A, line 35; Form 1040EZ, line 10)	2	2,582.
3 Federal income tax withheld (Form 1040, line 62; Form 1040A, line 36; Form 1040EZ, line 7)	3	5,603.
4 Refund (Form 1040, line 74a; Form 1040A, line 43a; Form 1040EZ, line 11; Form 1040-SS, Part I, line 12a)	4	2,173.
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**

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

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

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 ▶ 01/01/2012

**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: **KARL R KENT & KARA B BRYANT**

SSN: **211-02-0752**

<b>Gross Income</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Wages and salaries .....			41,951.
Interest and dividends .....			6,048.
Business income .....			2,378.
Sale of assets - gain or loss .....			(3,000.)
Pension and IRA distributions .....			20,328.
Rents, royalties, etc .....			1,050.
Unemployment and social security .....			14,180.
Other income .....			1,637.
Total gross income .....			84,572.
<b>Adjustments to Income</b> .....			10,332.
<b>Adjusted gross income</b> .....			74,240.
<b>Itemized or Standard Deductions</b>			
Medical expense deduction .....			3,907.
Taxes .....			4,538.
Interest .....			3,164.
Contributions .....			2,475.
Miscellaneous deductions .....			
Other itemized deductions .....			1,200.
Total deductions .....			15,284.
<b>Exemptions</b> .....			18,500.
Taxable Income .....	0	0	40,456.
<b>Tax (2011 - 1040, line 44)</b> .....	0	0	5,184.
Alternative minimum tax .....			
Other taxes .....			292.
<b>Credits and Payments</b>			
Credits .....			2,894.
Withholding .....			5,603.
EIC and Additional Child Tax Credit .....			
Estimated tax payments .....			400.
Other payments .....			925.
Total credits and payments .....			9,822.
Tax liability after credits .....			2,582.
Estimated tax penalty .....			
<b>Refund or (Balance Due)</b> .....			4,346.
Federal marginal tax bracket .....	0.0 %	0.0 %	15.0 %
<b>State refund or (balance due)</b>			
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:**

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**US Schedule A**

**Sales Tax Worksheet**

**2011**

Name: **KARL R KENT & KARA B BRYANT**

SSN: **211-02-0752**

<b>1</b>	Federal AGI .....		<b>74,240.</b>	
<b>2</b>	Nontaxable income listed on tax return			
<b>a</b>	Nontaxable interest .....	<b>338.</b>		
<b>b</b>	Social security .....	<b>2,052.</b>		
<b>c</b>	Combat pay .....			
<b>d</b>	Income on Forms 4970 and 4972 .....			
<b>e</b>	Nontaxable part of IRA, pension, or annuity distributions, not including rollovers .....	<b>335.</b>	<b>2,725.</b>	
<b>3</b>	Other nontaxable income			
<b>a</b>	.....			
<b>b</b>	.....			
<b>c</b>	.....			
<b>d</b>	.....			
<b>e</b>	.....			
<b>4</b>	<b>Income for sales tax chart</b> .....		<b>76,965.</b>	
<b>1</b>	Enter the taxpayer's state of residency for 2011 .....			<b>NJ</b>
	If the taxpayer was a part-year resident, enter the dates resided in this state _____ to _____			
	<b>State sales tax from the applicable table</b> .....			<b>1,063.</b>
<b>2</b>	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? <input checked="" type="checkbox"/> <b>No.</b> Line 2 should be -0-. <input type="checkbox"/> <b>Yes.</b> Enter the letter (A - D) for the optional local sales tax table you want to use .....			
	<b>Local sales tax from the applicable table</b> .....			
<b>3</b>	Did your locality impose a local general sales tax in 2011? Residents of California and Nevada, see the Schedule A instructions. <input checked="" type="checkbox"/> <b>No.</b> Go to line 7. <input type="checkbox"/> <b>Yes.</b> Enter the local general sales tax rate. If the rate is 2.5%, enter 2.5 .....			
<b>4</b>	Did you enter -0- on line 2 above? <input type="checkbox"/> <b>No.</b> Skip to line 6. <input type="checkbox"/> <b>Yes.</b> 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 .....			
<b>5</b>	Divide line 3 by line 4 .....			
<b>6</b>	Did you enter -0- on line 2 above? <input type="checkbox"/> <b>No.</b> Multiply line 2 by line 3. <input type="checkbox"/> <b>Yes.</b> Multiply line 1 by line 5 .....			
<b>7</b>	Total of lines 1 and 6 - prorated for part-year residents .....			<b>1,063.</b>
<b>8</b>	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 .....			
<b>9</b>	<b>Total sales tax using the sales tax chart</b> .....			<b>1,063.</b>
<b>10</b>	<b>Sales tax using actual receipts</b> .....			
<b>11</b>	<b>Sales tax deduction for Schedule A, line 5</b> .....			<b>1,063.</b>

Name: KARL R KENT & KARA B BRYANT

SSN: 211-02-0752

Use the spouse column if this is a married joint return for this year and the spouse filed separately last year.	Joint or Taxpayer	Spouse	Taxable
1 <u>NJ</u> 2010 state/local income tax refund .....	437.		
_____ 2010 state/local income tax refund .....			
Total state/local income tax refund for 2010 .....	437.		
<b>2 Enter the amounts from the 2010 tax return</b> If the itemized deductions were reduced due to the AGI limitation, be sure to enter the reduced amounts			
Schedule A, line 5a, income taxes .....	2,998.		
Schedule A, line 5b, general sales tax .....	689.		
Difference - the state tax refund is only taxable to the extent the state tax deduction exceeds the sales tax deduction .....	2,309.		
3 Net state/local income tax refund .....	437.		
4 Enter the total of all other Schedule A refunds or reimbursements .....			
5 Add lines 3 and 4 .....	437.		
<b>On the 2010 tax return,</b> If itemized deductions are reduced due to income limitations, AMT is included, or there are unused credits, see Publication 525. Some or all of the state tax refund may be tax-free. Check here if the ENTIRE state tax refund is nontaxable. Stop here .....	<input type="checkbox"/>	<input type="checkbox"/>	
6 2010 itemized deductions .....	12,787.		
7 Filing status for 2010. Enter 1, 2, 3, 4, or 5. 1 = Single                                   4 = Head of household 2 = Married filing jointly               5 = Qualifying widow(er) 3 = Married filing separately .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
If the 2010 filing status was married filing separately, and itemized deductions were required to be used because the spouse itemized, check here .....	<input type="checkbox"/>	<input type="checkbox"/>	
8 Age 65 or blind, enter amount from the 2010 Form 1040, page 2, line 39a .....	<input type="checkbox"/>	<input type="checkbox"/>	
9 Standard deduction .....	11,400.		
10 Net disaster loss from your 2010 Form 4684, line 18 .....			
11 New motor vehicle taxes from your 2010 Schedule A, line 7 .....			
12 Total standard deduction .....	11,400.		
13 Subtract line 13 from line 6 .....	1,387.		
14 Smaller of line 5 or line 14 .....	437.		
15 Enter the taxable income for 2010, adjusted for any NOL carryover. If less than -0-, show the amount as a negative number .....	49,859.		
16 Amount to include in income for 2011 .....	437.		
17 <b>Taxable state/local income tax refund</b> .....	437.		437.
18 <b>Taxable amount of other income</b> .....			