

# Individual Income Tax Return 2004

North Carolina Department of Revenue

Print in Black or Blue Ink Only

For calendar year 2004, or other tax year beginning (MM-00) - - 0 4 and ending (MM-00-YY) - - - -

Your Social Security Number

[REDACTED]

You must enter your social security number(s)

Spouse's Social Security Number

[REDACTED]

Your First Name (USE CAPITAL LETTERS FOR YOUR NAME AND ADDRESS)

DIANE

M.I.

S

Your Last Name

JONES

If Joint Return, Spouse's First Name

M.I.

Spouse's Last Name

Address

[REDACTED]

County (Identify the county)

WAKE

City

RALEIGH NORTH CAROLINA

State

Zip Code

Country (For U.S.)

### Deceased Taxpayer Information

If return is for a deceased taxpayer or deceased spouse, enter date of death.

Deceased taxpayer's date of death

[REDACTED]

Deceased spouse's date of death

[REDACTED]

### N.C. Public Campaign Fund

This fund pays for a nonpartisan voter guide and helps fund judicial candidates who accept strict fund-raising and spending limits. Do you agree that \$3 should go to this fund? Filing in a circle below will not increase your tax or reduce your refund.

You  Yes  No  
Your Spouse  Yes  No

### N.C. Political Parties Financing Fund

Fill in appropriate circle if you want to designate \$1 to this fund. Your tax remains the same whether or not you make a designation.

You  Democratic  Republican  Unspecified  
Your Spouse  Democratic  Republican  Unspecified

### Federal Adjusted Gross Income

Enter federal adjusted gross income from your federal return (Form 1040, Line 36; Form 1040A, Line 21; Form 1040EZ, Line 4; or TeleFile Tax Record, Line 5)

Fill in circle if negative

0.00

Residency Status: Were you a resident of N.C. for the entire year of 2004?  Yes  No  
Was your spouse a resident for the entire year?  Yes  No

Filing Status: Same as federal. Fill in one circle only. If your spouse was a nonresident and had no North Carolina taxable income in 2004, see the Line Instructions for Lines 1 through 5. If you do not indicate your filing status by filling in one of the circles, any refund due will be delayed.

- 1.  Single
- 2.  Married Filing Jointly
- 3.  Married Filing Separately → (Enter your spouse's Name and Social Security Number) Name THOMAS M. JONES JR SSN [REDACTED]
- 4.  Head of Household
- 5.  Qualifying Widow(er) with Dependent Child (Year spouse died: \_\_\_\_\_)

Enter the Number of Exemptions claimed on your federal income tax return  
1

Page references are to Form D-401, Individual Income Tax Instructions

Enter Whole U.S. Dollars Only

6. Taxable Income from Your Federal Income Tax Return  
Form 1040, Line 42; Form 1040A, Line 27; Form 1040EZ, Line 6; or TeleFile Tax Record, Line K(1) Taxable Income (if zero, see the Line Instructions)

If amount on Line 6, 8, or 10 is negative, fill in circle.

6.  0.00

7. Additions to Federal Taxable Income  
All taxpayers must complete Lines 29 through 38 on Page 3 and enter amount from Line 38

Example:

7. 2,450.00

8. Add Lines 6 and 7

8.  2,450.00

9. Deductions from Federal Taxable Income  
If applicable, complete Lines 39 through 46 on Page 3 and enter amount from Line 46

9.  0.00

10. Line 8 minus Line 9

10.  2,450.00



JONES

**2004**

[REDACTED]

11. Enter amount from Line 10

12. Part-year residents and nonresidents

Complete Lines 47 through 51 on Page 4 and enter decimal amount from Line 51

13. North Carolina Taxable Income

Full-year residents enter the amount from Line 11

Part-year residents and nonresidents multiply amount on Line 11 by the decimal amount on Line 12

14. North Carolina Income Tax

If the amount on Line 13 is less than \$68,000, use the Tax Table beginning on Page 15 of the Instructions to determine your tax. If the amount on Line 13 is \$68,000 or more, use the Tax Rate Schedule on Page 23 to calculate your tax.

15. Tax Credits (From Form D-400TC, Part 4, Line 31 - You must attach Form D-400TC if you enter an amount on this line)

16. Subtract Line 15 from Line 14

17. Consumer Use Tax (See instructions on Page 6)

18. Add Lines 16 and 17

19. North Carolina Income Tax Withheld

(Staple original or copy of the original State wage and tax statement(s) in top left-hand corner of the return)

a. Your tax withheld

▶ 19a.

524.00

b. Spouse's tax withheld

▶ 19b.

0.00

20. Other Tax Payments

a. 2004 Estimated Tax

▶ 20a.

0.00

b. Paid with Extension

▶ 20b.

0.00

c. Partnership

▶ 20c.

0.00

d. S Corporation

▶ 20d.

0.00

21. Add Lines 19a through 20d and enter the total on Line 21

21.

524.00

22. a. If Line 18 is more than Line 21, subtract and enter the result

▶ 22a.

0.00

b. Penalty for underpayment of estimated income tax (See instructions and enter letter in box, if applicable)

Penalty Exception

▶ 22b.

0.00

c. Other penalties and interest (See instructions)

22c.

0.00

23. Add Lines 22a, 22b, and 22c and enter the total - Pay This Amount

You can now pay online. Go to our website and click on Electronic Services for details.

23. \$

0.00

24. If Line 18 is less than Line 21, subtract and enter the result

24.

376.00

25. Amount of Line 24 to be applied to 2005 Estimated Income Tax

▶ 25.

0.00

26. Contribution to the N.C. Nongame and Endangered Wildlife Fund

▶ 26.

0.00

27. Add Lines 25 and 26

27.

0.00

28. Subtract Line 27 from Line 24 and enter the Amount To Be Refunded

▶ 28.

376.00

If amount on Line 11 or 13 is negative, fill in circle. Example: ●

11.  
 12.  
 13.

2,450.00  
0.00  
2,450.00  
146.00  
0.00  
146.00  
2.00  
148.00



Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.  
▶ Attach to Form 1040, 1040A, 1040-EZ or 1040X.

1 Type or print your first name and middle initial. **DIANE S** Last name **JONES** 2 Social security number (SSN) [REDACTED]

3 Address [REDACTED] **RALEIGH NORTH CAROLINA**

4 Enter year in space provided and check one box. For the tax year ending December 31, **2004**.  
I have been unable to obtain (or have received an incorrect)  Form W-2 OR  Form 1099-R.  
**EMERGENCY NOTIFY**  
I have notified the IRS of this fact. The amounts shown on line 7 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address and ZIP code [REDACTED] 6 Employer's or payer's identification number (if known) [REDACTED]

7(A) Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	<u>0</u>	g State income tax withheld	<u>87.00</u>
b Social security wages	<u>0</u>	(Name of state) <u>NC</u>	
c Medicare wages and tips	<u>0</u>	h Local income tax withheld	<u>0</u>
d Advance EIC payment	<u>0</u>	(Name of locality)	
e Social security tips	<u>0</u>	i Social security tax withheld	<u>160.00</u>
f Federal income tax withheld	<u>45.00</u>	j Medicare tax withheld	<u>37.00</u>

7(B) Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc.

1 Gross distribution	<u>          </u>	4 Federal income tax withheld	<u>          </u>
2a Taxable amount	<u>          </u>	5 State income tax withheld	<u>          </u>
2b Taxable amount not determined <input type="checkbox"/>		6 Local income tax withheld	<u>          </u>
Total distribution <input type="checkbox"/>		7 Employee contributions	<u>          </u>
3 Capital gain (included in 2a)	<u>          </u>	8 Distribution codes	<u>          </u>

8 How did you determine the amounts in lines 7(A) and 7(B) above? **COMPANY PROVIDED RECORDS & THE STATUTORY LANGUAGE BEHIND IRC SECTIONS 3401, 3121 & OTHERS**

9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement. **REQUEST, BUT THE COMPANY REFUSES TO ISSUE FORMS CORRECTLY LISTING PAYMENTS OF "WAGES" AS DEFINED BY IRC 3401(a) & 3121 (a) FOR FEAR OF IRS RETALIATION. AMOUNTS WITHHELD ON W-2 ARE CORRECT.**

Under penalties of perjury, I declare that I have examined this statement, and to the best of my knowledge and belief, it is true, correct, and complete.  
**Sign Here** Signature ▶ Diane S. Jones Date ▶ 3/6/06

**Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

OMB No. 1545-0074

▶ Attach to Form 1040, 1040A, 1040-EZ or 1040X.

1 Type or print your first name and middle initial. **DIANE S** Last name **JONES** 2 Social security number (SSN) [REDACTED]

3 Address [REDACTED] **RALEIGH NORTH CAROLINA** [REDACTED]

4 Enter year in space provided and check one box. For the tax year ending December 31, **2024**, I have been unable to obtain (or have received an incorrect)  Form W-2 OR  Form 1099-R.

**HEAVILY NOTIFY**

I have notified the IRS of this fact. The amounts shown on line 7 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address and ZIP code [REDACTED] **RALEIGH NORTH CAROLINA** [REDACTED] 6 Employer's or payer's identification number (if known) [REDACTED]

7(A) Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	<u>0</u>	g State income tax withheld	<u>524.00</u>
b Social security wages	<u>0</u>	(Name of state)	<u>NC</u>
c Medicare wages and tips	<u>0</u>	h Local income tax withheld	<u>0</u>
d Advance-EIC payment	<u>0</u>	(Name of locality)	
e Social security tips	<u>0</u>	i Social security tax withheld	<u>714.00</u>
f Federal income tax withheld	<u>344.00</u>	j Medicare tax withheld	<u>167.04</u>

7(B) Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc.

1 Gross distribution	_____	4 Federal income tax withheld	_____
2a Taxable amount	_____	5 State income tax withheld	_____
2b Taxable amount not determined	<input type="checkbox"/>	6 Local income tax withheld	_____
Total distribution	<input type="checkbox"/>	7 Employee contributions	_____
3 Capital gain (included in 2a)	_____	8 Distribution codes	_____

8 How did you determine the amounts in lines 7(A) and 7(B) above? **COMPANY PROVIDED RECORDS & THE STATUTORY LANGUAGE BEHIND IRC SECTIONS 3401, 3121 & OTHERS**

9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement. **REQUEST, BUT THE COMPANY REFUSES TO ISSUE FORMS CORRECTLY LISTING PAYMENTS OF "WAGES" AS DEFINED IN IRC 3401(a) & 3121(c) FOR FEAR OF IRS RETALIATION. AMOUNTS WITHHELD ON W-2 ARE CORRECT.**

**Sign Here**

Under penalties of perjury, I declare that I have examined this statement, and to the best of my knowledge and belief, it is true, correct, and complete.  
Signature ▶ Diane S. Jones Date ▶ 3/6/06