



**Tax and Credits****Standard Deduction for—**

• People who checked any box on line 39a or 39b or who can be claimed as a dependent, see page 34.

• All others:

Single or Married filing separately, \$5,150

Married filing jointly or Qualifying widower, \$10,300

Head of household, \$7,550

38	Amount from line 37 (adjusted gross income)		38	200	00
39a	Check <input type="checkbox"/> You were born before January 2, 1942, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1942, <input type="checkbox"/> Blind. Total boxes checked ▶ 39a				
b	If your spouse itemizes on a separate return or you were a dual-status alien, see page 34 and check here ▶ 39b				
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)		40	5,150	00
41	Subtract line 40 from line 38		41	- 4,950	00
42	If line 38 is over \$112,875, or you provided housing to a person displaced by Hurricane Katrina, see page 36. Otherwise, multiply \$3,300 by the total number of exemptions claimed on line 6d		42	3,300	00
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-		43	- 0 -	
44	Tax (see page 36). Check if any tax is from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972		44	- 0 -	
45	Alternative minimum tax (see page 39). Attach Form 6251		45	- 0 -	
46	Add lines 44 and 45		46	- 0 -	
47	Foreign tax credit. Attach Form 1116 if required	47			
48	Credit for child and dependent care expenses. Attach Form 2441	48			
49	Credit for the elderly or the disabled. Attach Schedule R	49			
50	Education credits. Attach Form 8863	50			
51	Retirement savings contributions credit. Attach Form 8880	51			
52	Residential energy credits. Attach Form 5695	52			
53	Child tax credit (see page 42). Attach Form 8901 if required	53			
54	Credits from: a <input type="checkbox"/> Form 8396 b <input type="checkbox"/> Form 8839 c <input type="checkbox"/> Form 8859	54			
55	Other credits: a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8801 c <input type="checkbox"/> Form _____	55			
56	Add lines 47 through 55. These are your total credits	56		- 0 -	
57	Subtract line 56 from line 46. If line 56 is more than line 46, enter -0-	57		- 0 -	
58	Self-employment tax. Attach Schedule SE	58		- 0 -	
59	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	59		- 0 -	
60	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	60		- 0 -	
61	Advance earned income credit payments from Form(s) W-2, box 9	61		- 0 -	
62	Household employment taxes. Attach Schedule H	62		- 0 -	
63	Add lines 57 through 62. This is your total tax	63		- 0 -	

**Other Taxes****Payments**

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax withheld from Forms W-2 and 1099	64	37,072	84	
65	2006 estimated tax payments and amount applied from 2005 return	65	- 0 -		
66a	Earned income credit (EIC)	66a	- 0 -		
b	Nontaxable combat pay election ▶ 66b				
67	Excess social security and tier 1 RRTA tax withheld (see page 60)	67	- 0 -		
68	Additional child tax credit. Attach Form 8812	68	- 0 -		
69	Amount paid with request for extension to file (see page 60)	69	- 0 -		
70	Payments from: a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136 c <input type="checkbox"/> Form 8885	70	- 0 -		
71	Credit for federal telephone excise tax paid. Attach Form 8913 if required	71	- 0 -		
72	Add lines 64, 65, 66a, and 67 through 71. These are your total payments	72	37,072	84	

**Refund**

Direct deposit? See page 61 and fill in 74b, 74c, and 74d, or Form 8888.

73	If line 72 is more than line 63, subtract line 63 from line 72. This is the amount you overpaid	73	37,072	84	
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here ▶ <input type="checkbox"/>	74a	37,072	84	
▶ b	Routing number <input type="text"/>	▶ c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
▶ d	Account number <input type="text"/>				
75	Amount of line 73 you want applied to your 2007 estimated tax ▶	75	- 0 -		
76	Amount you owe. Subtract line 72 from line 63. For details on how to pay, see page 62 ▶	76			
77	Estimated tax penalty (see page 62)	77			

**Amount You Owe**

**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. Last name **2** Social security number (SSN)  
 L H **999-99-9999**

**3** Address

**4** Enter year in space provided and check one box. For the tax year ending December 31, 2006,  
 I have been unable to obtain (or have received an incorrect)  Form W-2 OR  Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 or line 8 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 **6** Employer's or payer's identification number (if known)  
**Private Sector Employer Address** **99-9999999**

**7** Form W-2. Enter wages, tips, other compensation, and taxes withheld.

<b>a</b> Wages, tips, and other compensation	<u>-0-</u>	<b>g</b> State income tax withheld	<u>-0-</u>
<b>b</b> Social security wages	<u>-0-</u>	(Name of state)	
<b>c</b> Medicare wages and tips	<u>-0-</u>	<b>h</b> Local income tax withheld	<u>-0-</u>
<b>d</b> Advance EIC payment	<u>-0-</u>	(Name of locality)	<u>-----</u>
<b>e</b> Social security tips	<u>-0-</u>	<b>i</b> Social security tax withheld	<u>4,459.85</u>
<b>f</b> Federal income tax withheld	<u>31,569.93</u>	<b>j</b> Medicare tax withheld	<u>1,043.06</u>

**8** Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc.

<b>a</b> Gross distribution	<u>                    </u>	<b>f</b> Federal income tax withheld	<u>                    </u>
<b>b</b> Taxable amount	<u>                    </u>	<b>g</b> State income tax withheld	<u>                    </u>
<b>c</b> Taxable amount not determined	<input type="checkbox"/>	<b>h</b> Local income tax withheld	<u>                    </u>
<b>d</b> Total distribution	<input type="checkbox"/>	<b>i</b> Employee contributions	<u>                    </u>
<b>e</b> Capital gain (included in 8b)	<u>                    </u>	<b>j</b> Distribution codes	<u>                    </u>

**9** How did you determine the amounts on lines 7 and 8 above?  
**Company provided records and the statutory language behind IRC sections 3401 and 3121 and others. 29,501.03 withheld via notice of levy.**

**10** Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.  
**None, the W-2 had been issued before "wage" errors were noted. The amounts they identified as withheld were correct as reflected in Line No. 7 above.**