

Label

(See instructions on page 16.)
Use the IRS label.
Otherwise, please print or type.

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E

For the year Jan. 1–Dec. 31, 2006, or other tax year beginning _____, 2006, ending _____, 20

Your first name and initial Walter D.	Last name Martin III
If a joint return, spouse's first name and initial Marla M.	Last name Martin
Home address (number and street). If you have a P.O. box, see page 16.	
Apt. no.	
City, town or post office, state, and ZIP code. If you have a foreign address, see page 16.	

OMB No. 1545-0074

Your social security number
.....

Spouse's social security number
.....

▲ You must enter your SSN(s) above. ▲

Presidential Election Campaign

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 16) ▶ You Spouse

Filing Status

Check only one box.

1 Single

2 Married filing jointly (even if only one had income)

3 Married filing separately. Enter spouse's SSN above and full name here. ▶

4 Head of household (with qualifying person). (See page 17.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶

5 Qualifying widow(er) with dependent child (see page 17)

Exemptions

If more than four dependents, see page 19

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

b Spouse

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> Qualifying child for child tax credit (see page 19)
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

d Total number of exemptions claimed

Boxes checked on 6a and 6b: 2

No. of children on 6c who:

- lived with you: 1
- did not live with you due to divorce or separation (see page 20):

Dependents on 6c not entered above: 0

Add numbers on lines above ▶ **3**

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a W-2, see page 23.

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

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	0	
8a	Taxable interest. Attach Schedule B if required	8a	333	60
b	Tax-exempt interest. Do not include on line 8a	8b		
9a	Ordinary dividends. Attach Schedule B if required	9a		
b	Qualified dividends (see page 23)	9b		
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 24)	10		
11	Alimony received	11		
12	Business income or (loss). Attach Schedule C or C-EZ	12		
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/>	13		
14	Other gains or (losses). Attach Form 4797	14		
15a	IRA distributions	15a		
b	Taxable amount (see page 25)	15b		
16a	Pensions and annuities	16a		
b	Taxable amount (see page 26)	16b		
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17		
18	Farm income or (loss). Attach Schedule F	18		
19	Unemployment compensation	19		
20a	Social security benefits	20a		
b	Taxable amount (see page 27)	20b		
21	Other income. List type and amount (see page 29)	21		
22	Add the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	333	60

Adjusted Gross Income

23	Archer MSA deduction. Attach Form 8853	23		
24	Certain business expenses of reservists, performing artists, and fee-basis government 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	One-half of self-employment tax. Attach Schedule SE	27		
28	Self-employed SEP, SIMPLE, and qualified plans	28		
29	Self-employed health insurance deduction (see page 29)	29		
30	Penalty on early withdrawal of savings	30		
31a	Alimony paid b Recipient's SSN ▶	31a		
32	IRA deduction (see page 31)	32		
33	Student loan interest deduction (see page 33)	33		
34	Jury duty pay you gave to your employer	34		
35	Domestic production activities deduction. Attach Form 8903	35		
36	Add lines 23 through 31a and 32 through 35	36	0	
37	Subtract line 36 from line 22. This is your adjusted gross income ▶	37	333	60

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 widow(er), \$10,300

Head of household, \$7,550

38	Amount from line 37 (adjusted gross income)		38	333	60
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	0			
b	If your spouse itemizes on a separate return or you were a dual-status alien, see page 34 and check here ▶ 39b	<input type="checkbox"/>			
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)		40	10300	
41	Subtract line 40 from line 38		41	<9966	40>
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	9900	
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		
46	Add lines 44 and 45		46	0	
47	Foreign tax credit. Attach Form 1116 if required	47	0		
48	Credit for child and dependent care expenses. Attach Form 2441	48	0		
49	Credit for the elderly or the disabled. Attach Schedule R	49	0		
50	Education credits. Attach Form 8863	50	0		
51	Retirement savings contributions credit. Attach Form 8880	51	0		
52	Residential energy credits. Attach Form 5695	52	0		
53	Child tax credit (see page 42). Attach Form 8901 if required	53	0		
54	Credits from: a <input type="checkbox"/> Form 8396 b <input type="checkbox"/> Form 8838 c <input type="checkbox"/> Form 8859	54	0		
55	Other credits: a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8901 c <input type="checkbox"/> Form	55	0		
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	

Other Taxes

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	

Payments

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax withheld from Forms W-2 and 1099	64	16766	33	
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	0			
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	16766	33

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	16766	33	
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here ▶ <input type="checkbox"/>	74a	16766	33	
b	Routing number				
c	Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings				
d	Account number				
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	0		
77	Estimated tax penalty (see page 62) ▶ 77				

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 63)? Yes. Complete the following. No

Designee's name ▶

Phone no. ▶ ()

Personal identification number (PIN) ▶

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. Marla M.	Last name Martin	2 Social security number (SSN)
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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)
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7 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>1687.19</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>1877.94</u>
f Federal income tax withheld	<u>2625.39</u>	j Medicare tax withheld	<u>439.20</u>

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

a Gross distribution	<u>0</u>	f Federal income tax withheld	<u>0</u>
b Taxable amount	<u>0</u>	g State income tax withheld	<u>0</u>
c Taxable amount not determined	<input type="checkbox"/>	h Local income tax withheld	<u>0</u>
d Total distribution	<input type="checkbox"/>	i Employee contributions	<u>0</u>
e Capital gain (included in 8b)	<u>0</u>	j Distribution codes	<u>0</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

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
 None. Most companies will refuse to issue forms correctly listing payments of wages as defined in 3401(a) and 3121(a) for fear of IRS retaliation. The amounts listed as withheld on the W2 it submitted are correct, however

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. Walter D.	Last name Martin III	2 Social security number (SSN)
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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)
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7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	0	g State income tax withheld	2191.00
b Social security wages	0	(Name of state)	NC
c Medicare wages and tips	0	h Local income tax withheld	0
d Advance EIC payment	0	(Name of locality)	
e Social security tips	0	i Social security tax withheld	2274.69
f Federal income tax withheld	5143.42	j Medicare tax withheld	531.98

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

a Gross distribution	0	f Federal income tax withheld	0
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined <input type="checkbox"/>		h Local income tax withheld	0
d Total distribution <input type="checkbox"/>		i Employee contributions	0
e Capital gain (included in 8b)	0	j Distribution codes	0

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

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
 None. Most companies will refuse to issue forms correctly listing payments of wages as defined in 3401(a) and 3121(a) for fear of IRS retaliation. The amounts listed as withheld on the W2 it submitted are correct, however

4852

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.

Form
(Rev. January 2007)
Department of the Treasury
Internal Revenue Service

1 Type or print your first name and middle initial. Walter D.	Last name Martin III	2 Social security number (SSN)
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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)
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7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	0	g State income tax withheld	1073.00
b Social security wages	0	(Name of state)	NC
c Medicare wages and tips	0	h Local income tax withheld	0
d Advance EIC payment	0	(Name of locality)	
e Social security tips	0	i Social security tax withheld	1162.41
f Federal income tax withheld	2439.45	j Medicare tax withheld	271.85

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

a Gross distribution	0	f Federal income tax withheld	0
b Taxable amount	0	g State income tax withheld	0
c Taxable amount not determined <input type="checkbox"/>		h Local income tax withheld	0
d Total distribution	0	i Employee contributions	0
e Capital gain (included in 8b)	0	j Distribution codes	0

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

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
None. Most companies will refuse to issue forms correctly listing payments of "wages as defined in 3401(a) and 3121(a) for fear of IRS retaliation. The amounts listed as withheld on the W2 it submitted are correct, however