

For the year Jan. 1-Dec. 31, 2011, or other tax year beginning 1-1, 2011, ending 12-31, 2011. See separate instructions.

Your first name and initial <u>Joseph F.</u>	Last name <u>Davis</u>	Your social security number <u>[REDACTED]</u>
If a joint return, spouse's first name and initial	Last name	Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions. <u>[REDACTED]</u>		Apt. no. <u>[REDACTED]</u>
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). <u>[REDACTED]</u>		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. <input type="checkbox"/> You <input type="checkbox"/> Spouse
Foreign country name	Foreign province/county	Foreign postal code

Filing Status Check only one box.

1 <input checked="" type="checkbox"/> Single	4 <input type="checkbox"/> Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
2 <input type="checkbox"/> Married filing jointly (even if only one had income)	5 <input type="checkbox"/> Qualifying widow(er) with dependent child
3 <input type="checkbox"/> Married filing separately. Enter spouse's SSN above and full name here. ▶	

Exemptions

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

b ☐ Spouse

c Dependents:		(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> If child under age 17 qualifying for child tax credit (see instructions)
(1) First name	Last name			
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

If more than four dependents, see instructions and check here ☐

d Total number of exemptions claimed

Boxes checked on 6a and 6b: 1

No. of children on 6c who:
• lived with you
• did not live with you due to divorce or separation (see instructions)
Dependents on 6c not entered above
Add numbers on lines above ▶ 1

Income

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

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

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

7 Wages, salaries, tips, etc. Attach Form(s) W-2	7 <u>0</u>
8a Taxable interest. Attach Schedule B if required	8a <u>0</u>
b Tax-exempt interest. Do not include on line 8a	8b
9a Ordinary dividends. Attach Schedule B if required	9a
b Qualified dividends	9b
10 Taxable refunds, credits, or offsets of state and local income taxes	10
11 Alimony received	11
12 Business income or (loss). Attach Schedule C or C-EZ	12
13 Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13
14 Other gains or (losses). Attach Form 4797	14
15a IRA distributions	15a
b Taxable amount	15b
16a Pensions and annuities	16a
b Taxable amount	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 <u>0</u>
20a Social security benefits	20a
b Taxable amount	20b <u>0</u>
21 Other income. List type and amount	21 <u>0</u>
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22 <u>0</u>

Adjusted Gross Income

23 Educator expenses	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 Deductible part of self-employment tax. Attach Schedule SE	27
28 Self-employed SEP, SIMPLE, and qualified plans	28
29 Self-employed health insurance deduction	29
30 Penalty on early withdrawal of savings	30
31a Alimony paid b Recipient's SSN ▶	31a
32 IRA deduction	32
33 Student loan interest deduction	33
34 Tuition and fees. Attach Form 8917	34
35 Domestic production activities deduction. Attach Form 8903	35
36 Add lines 23 through 35	36 <u>0</u>
37 Subtract line 36 from line 22. This is your adjusted gross income ▶	37 <u>0</u>

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

Payments

If you have a qualifying child, attach Schedule EIC.

Refund

Direct deposit? See instructions.

Amount You Owe

Third Party Designee

Sign Here

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

38	Amount from line 37 (adjusted gross income)	38	-0-
39a	Check <input type="checkbox"/> You were born before January 2, 1947, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1947, <input type="checkbox"/> Blind. Total boxes checked ▶ 39a		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b <input type="checkbox"/>		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	5,800
41	Subtract line 40 from line 38	41	-0-
42	Exemptions. Multiply \$3,700 by the number on line 6d.	42	3,700
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	-0-
44	Tax (see instructions). Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/> 962 election	44	
45	Alternative minimum tax (see instructions). Attach Form 6251	45	
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	Education credits from Form 8863, line 23	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit (see instructions)	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	
54	Add lines 47 through 53. These are your total credits	54	-0-
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	-0-
56	Self-employment tax. Attach Schedule SE	56	
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Other taxes. Enter code(s) from instructions	60	-0-
61	Add lines 55 through 60. This is your total tax	61	-0-
62	Federal income tax withheld from Forms W-2 and 1099	62	\$ 1,849
63	2011 estimated tax payments and amount applied from 2010 return	63	-0-
64a	Earned income credit (EIC) No.	64a	-0-
b	Nontaxable combat pay election 64b		
65	Additional child tax credit. Attach Form 8812	65	
66	American opportunity credit from Form 8863, line 14	66	
67	First-time homebuyer credit from Form 5405, line 10	67	
68	Amount paid with request for extension to file	68	
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> 8839 c <input type="checkbox"/> 8801 d <input type="checkbox"/> 8885	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	1,849 43
73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	1,849 43
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here ▶ <input type="checkbox"/>	74a	1,849 43
b	Routing number X X X X X X X X X ▶ c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
d	Account number X X X X X X X X X X X X X X X X		
75	Amount of line 73 you want applied to your 2012 estimated tax ▶ 75		
76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions ▶	76	-0-
77	Estimated tax penalty (see instructions) 77		-0-

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

Designee's name ▶

Phone no. ▶

Personal identification number (PIN) ▶

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Your occupation

Daytime phone number

Spouse's signature. If a joint return, both must sign.

Date

Spouse's occupation

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

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 Name(s) shown on return

Joseph Davis

2 Your social security number

[REDACTED]

3 Address

[REDACTED]

4 Enter year in space provided and check one box. For the tax year ending December 31, 2011,

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

[REDACTED]

6 Employer's or payer's identification number (if known)

[REDACTED]

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>249.00</u>
b Social security wages	<u>-0-</u>	(Name of state) <u>OK</u>	
c Medicare wages and tips	<u>-0-</u>	h Local income tax withheld	
d Advance EIC payment	<u>-0-</u>	(Name of locality)	
e Social security tips	<u>-0-</u>	i Social security tax withheld	<u>498.12</u>
f Federal income tax withheld	<u>593.00</u>	j Medicare tax withheld	<u>168.68</u>

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

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

9 How did you determine the amounts on lines 7 and 8 above? *Payer provided a w-2 which erroneously alleges payments or IRC section 3401(a)(3)(A)(i) "wages". I hereby dispute payers data. I received no such wages. The withholdings are correct.*

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

NONE. Payer issued a w-2 before "wages" errors were noted.

The payers "wages" originally issued is bad payer data.

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 ▶

Joseph Davis

Date ▶

11-16-12

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 Name(s) shown on return

Joseph Davis

2 Your social security number

3 Address

4 Enter year in space provided and check one box. For the tax year ending December 31, 2011,

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)

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

a Wages, tips, and other compensation

-0-

g State income tax withheld

144

b Social security wages

-0-

(Name of state) .

OK

c Medicare wages and tips

-0-

h Local income tax withheld

(Name of locality)

d Advance EIC payment

-0-

i Social security tax withheld

405.80

e Social security tips

-0-

j Medicare tax withheld

140.10

f Federal income tax withheld

43.73

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

a Gross distribution

f Federal income tax withheld

b Taxable amount

g State income tax withheld

c Taxable amount not determined ☐

h Local income tax withheld

d Total distribution ☐

i Employee contributions

e Capital gain (included in line 8b)

j Distribution codes

9 How did you determine the amounts on lines 7 and 8 above? Payer provided a w2 which erroneously alleges payments or IRC section 3401(a) + 3121(a) "wages".

I hereby dispute payers data. I received no such wages. The withholdings are correct.

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

None. Payer issued a w-2 before "wages" errors were noted.

The payers "wages" issued is bad payer data.

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 ▶

Joseph Davis

Date ▶ 11-16-12