Richard L. Bristol
[redacted]
South Jordan, UT 84095

August 26, 2016
SSN: [redacted]

Department of the Treasury
Internal Revenue Service
Fresno, CA 93888-0002

RE: Tax year 2006: 1040X, 1040, 4852 & Copy of taxes paid for tax year 2006

To the Internal Revenue Service:

On February 5th 2016, I met with Salt Lake City Revenue Officer, Evelyn Smith, ID 0144595 and tendered a payment of $8,391.12 for tax year 2006 (copy of check enclosed). This payment was made to halt collection activities with respect to 2006, with the understanding that I would be able to file an Amended Return within two years of payment to correct my tax records, and to claim any refund that was due.

Prior to meeting with Evelyn, I had requested that she provide me with a copy of my tax return for the year 2006, as I had lost ALL of my tax records due to a broken water main and severe flooding of my premises. At the time of our meeting, she informed me that she did NOT have a copy of my 2006 return ... because the amount of the tax being collected was determined on the basis of a "Substitute for Return" created by the Service. She informed me that I would have to file an "Original Return" and go from there.

I am filing an "Original Return" form 1040 today for 2006, enclosed. I have also included an AMENDED return for 2006 on a form 1040X because that form is necessary to establish the correct amount of the TOTAL REFUND which is due.

The "Original Return" enclosed contains a form 4852, which corrects the W-2 Form submitted by my employer (the payer). The amounts shown on the form 4852 were determined from the W-2 listed by the payer on line 5 of the 4852. The payer erroneously alleged IRC section 3121(a) and IRC section 3401(a) transactions. This claim was rebutted on the form 4852, and rebutted again, herein, as I am a private sector worker and payer is a private sector company not engaged in any privileged activity.

This correction establishes a total overpayment of $7,247.00 on the "Original Return" which is to be REFUNDED. However, I also paid $8,391.12 to Evelyn Smith which is also to be REFUNDED. The only form I could find to properly show this additional $8,391.12 payment was on the 1040X return for 2006, also enclosed. Shown on line 17 of the 1040X.

The total refund due is $15,638.12 as shown on lines 20, 22 and 23 of the 1040X.

Please note that I did NOT fill in columns A and B on the 1040X. I did NOT fill those in for two reasons:

(1) Nothing has changed on those lines based on the "Original Return" I filed today.

(2) However, should Evelyn Smith have been in ERROR, and it is found that there actually was an earlier-dated "Original Return" filed, then the figures from that "Original Return" may be entered onto the form. I authorize you to enter the appropriate figures into columns A and B as necessary. I do NOT authorize any changes to column C.

Thank you in advance for your help in this matter. I greatly appreciate your efforts to bring this tax year 2006 to a final close, with apologies for the many circumstances beyond my control which has delayed this matter far too long.

With best regards,

Sincerely yours,

Richard L. Bristol

Richard L. Bristol

Enclosures:

1040 Original Return for 2006
1040X Amended Return to Clarify Total Amount of Refund
Copy of Check Issued 2/5/16 in the amount of $8,391.12

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return **2006** (99) IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2006, or other tax year beginning , 2006, ending , 20 OMB No. 1545-0074

Label

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

Your first name and initial: Richard L.	Last name: Bristol	Your social security number: [redacted]
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 page 16. [redacted]	Apt. no. [redacted]	▲ You must enter your SSN(s) above. ▲
City, town or post office, state, and ZIP code. If you have a foreign address, see page 16. South Jordan, UT 84095		Checking a box below will not change your tax or refund.

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

6a ☑ **Yourself.** If someone can claim you as a dependent, do not check box 6a . . . . Boxes checked on 6a and 6b: 1
b ☐ **Spouse**
c **Dependents:**

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 19)
			☐
			☐
			☐
			☐

If more than four dependents, see page 19.

No. of children on 6c who:
• lived with you
• did not live with you due to divorce or separation (see page 20)
Dependents on 6c not entered above
Add numbers on lines above ▶ 1

d Total number of exemptions claimed

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 00
8a	**Taxable** interest. Attach Schedule B if required		8a	0 00
b	**Tax-exempt** interest. **Do not** include on line 8a	8b 0 00		
9a	Ordinary dividends. Attach Schedule B if required		9a	0 00
b	Qualified dividends (see page 23)	9b 0 00		
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 24)		10	0 00
11	Alimony received		11	0 00
12	Business income or (loss). Attach Schedule C or C-EZ		12	0 00
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐		13	0 00
14	Other gains or (losses). Attach Form 4797		14	0 00
15a	IRA distributions	15a 0 00	b Taxable amount (see page 25) 15b	0 00
16a	Pensions and annuities	16a 0 00	b Taxable amount (see page 26) 16b	0 00
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17	0 00
18	Farm income or (loss). Attach Schedule F		18	0 00
19	Unemployment compensation		19	0 00
20a	Social security benefits	20a 0 00	b Taxable amount (see page 27) 20b	0 00
21	Other income. List type and amount (see page 29)		21	0 00
22	Add the amounts in the far right column for lines 7 through 21. This is your **total income** ▶		22	0 00

Adjusted Gross Income

23	Archer MSA deduction. Attach Form 8853	23	0 00		
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	0 00		
25	Health savings account deduction. Attach Form 8889	25	0 00		
26	Moving expenses. Attach Form 3903	26	0 00		
27	One-half of self-employment tax. Attach Schedule SE	27	0 00		
28	Self-employed SEP, SIMPLE, and qualified plans	28	0 00		
29	Self-employed health insurance deduction (see page 29)	29	0 00		
30	Penalty on early withdrawal of savings	30	0 00		
31a	Alimony paid b Recipient's SSN ▶	31a	0 00		
32	IRA deduction (see page 31)	32	0 00		
33	Student loan interest deduction (see page 33)	33	0 00		
34	Jury duty pay you gave to your employer	34	0 00		
35	Domestic production activities deduction. Attach Form 8903	35	0 00		
36	Add lines 23 through 31a and 32 through 35			36	0 00
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶			37	0 00

Tax and Credits

38	Amount from line 37 (adjusted gross income)	38	0	00
39a	Check if: ☐ You were born before January 2, 1942, ☐ Blind. ☐ Spouse was born before January 2, 1942, ☐ 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	-5,150	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	00
44	Tax (see page 36). Check if any tax is from: a ☐ Form(s) 8814 b ☐ Form 4972	44	0	00
45	**Alternative minimum tax** (see page 39). Attach Form 6251	45	0	00
46	Add lines 44 and 45 ▶	46	0	00
47	Foreign tax credit. Attach Form 1116 if required	47	0	00
48	Credit for child and dependent care expenses. Attach Form 2441	48	0	00
49	Credit for the elderly or the disabled. Attach Schedule R	49	0	00
50	Education credits. Attach Form 8863	50	0	00
51	Retirement savings contributions credit. Attach Form 8880.	51	0	00
52	Residential energy credits. Attach Form 5695	52	0	00
53	Child tax credit (see page 42). Attach Form 8901 if required	53	0	00
54	Credits from: a ☐ Form 8396 b ☐ Form 8839 c ☐ Form 8859	54	0	00
55	Other credits: a ☐ Form 3800 b ☐ Form 8801 c ☐ Form ____	55	0	00
56	Add lines 47 through 55. These are your **total credits**	56	0	00
57	Subtract line 56 from line 46. If line 56 is more than line 46, enter -0- ▶	57	0	00

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

Other Taxes

58	Self-employment tax. Attach Schedule SE	58	0	00
59	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	59	0	00
60	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	60	0	00
61	Advance earned income credit payments from Form(s) W-2, box 9	61	0	00
62	Household employment taxes. Attach Schedule H	62	0	00
63	Add lines 57 through 62. This is your **total tax** ▶	63	0	00

Payments

64	Federal income tax withheld from Forms W-2 and 1099	64	7,247	00
65	2006 estimated tax payments and amount applied from 2005 return	65	0	00
66a	**Earned income credit (EIC)**	66a	0	00
b	Nontaxable combat pay election ▶ 66b			
67	Excess social security and tier 1 RRTA tax withheld (see page 60)	67	0	00
68	Additional child tax credit. Attach Form 8812	68	0	00
69	Amount paid with request for extension to file (see page 60)	69	0	00
70	Payments from: a ☐ Form 2439 b ☐ Form 4136 c ☐ Form 8885	70	0	00
71	Credit for federal telephone excise tax paid. Attach Form 8913 if required	71	0	00
72	Add lines 64, 65, 66a, and 67 through 71. These are your **total payments** ▶	72	7,247	00

If you have a qualifying child, attach Schedule EIC.

Refund

73	If line 72 is more than line 63, subtract line 63 from line 72. This is the amount you **overpaid**	73	7,247	00
74a	Amount of line 73 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐	74a	7,247	00
▶ b	Routing number ▶ c Type: ☐ Checking ☐ Savings			
▶ d	Account number			
75	Amount of line 73 you want **applied to your 2007 estimated tax** ▶ 75			

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

Amount You Owe

76	**Amount you owe.** Subtract line 72 from line 63. For details on how to pay, see page 62 ▶	76	0	00
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) ▶

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. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See page 17. Keep a copy for your records.

Your signature	Date	Your occupation	Daytime phone number
[illegible]	8/26/16	Retail Sales	([redacted]) [redacted]
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed), address, and ZIP code ▶		EIN	
		Phone no. ( )	

Form **4852**
(Rev. December 2005)
Department of the Treasury
Internal Revenue Service

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.**

OMB No. 1545-0074

1 Type or print your first name and middle initial.	Last name	2 Social security number (SSN)
Richard L	Bristol	[redacted]

3 Address
[redacted] South Jordan, UT 84095

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 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)
[redacted] Company, [redacted] Mesa, AZ 85210	[redacted]

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

a	Wages, tips, and other compensation	0.00	g	State income tax withheld	0.00
b	Social security wages	0.00		(Name of state)	
c	Medicare wages and tips	0.00	h	Local income tax withheld	0.00
d	Advance EIC payment	0.00		(Name of locality)	
e	Social security tips	0.00	i	Social security tax withheld	3,178.00
f	Federal income tax withheld	3,326.00	j	Medicare tax withheld	743.00

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	☐	6	Local income tax withheld	
	Total distribution	☐	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?
Amounts were determined from the W-2 issued by payer listed on line 5 herein. Payer erroneously alleged IRC section 3121(e) and IRC section 3401(e) transactions. This claim is hereby rebutted. I am a private sector worker and payer is a private sector company not engaged in a privileged activity. The amounts on line 7(a-j) herein are to the best of my knowledge and belief, true, correct and complete.

9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
Not required

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 ▶ Richard L Bristol Date ▶ 8/26/16

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c and 1099-R and is completed by taxpayers or their representatives when (a) their employer or payer does not give them a Form W-2 or Form 1099-R and (b) when an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to your income tax return.

You should always attempt to get Form W-2 or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. After February 14th, you may call the IRS at 1-800-829-1040 if you still have not received Form W-2 or Form 1099-R. Generally, do not file Form 4852 before April 15th. Employees affected by Hurricanes Katrina, Rita, and Wilma should call the IRS at 1-866-562-5227 for additional guidance.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note. Retain a copy of Form 4852 for your records. Check your Social Security statement (received at least a full year after the date shown on Line 4) against Form 4852. If the earnings you reported on Form 4852 are not shown in the statement, you should contact SSA at the telephone number shown on the statement.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R, after your return is filed with Form 4852, and the information differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return.

Form **1040X** (Rev. December 2006)

Department of the Treasury—Internal Revenue Service

Amended U.S. Individual Income Tax Return

▶ See separate instructions.

OMB No. 1545-0074

This return is for calendar year ▶ , or fiscal year ended ▶

Please print or type

Your first name and initial Richard L	Last name Bristol	Your social security number [redacted]
If a joint return, spouse's first name and initial	Last name	Spouse's social security number
Home address (no. and street) or P.O. box if mail is not delivered to your home [redacted]	Apt. no. [redacted]	Phone number ([redacted]) [redacted]
City, town or post office, state, and ZIP code. If you have a foreign address, see page 2 of the instructions. South Jordan, UT 84095		

A If the address shown above is different from that shown on your last return filed with the IRS, would you like us to change it in our records? ▶ ☑ Yes ☐ No

B Filing status. Be sure to complete this line. **Note.** You cannot change from joint to separate returns after the due date.

On original return ▶ ☑ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

On this return ▶ ☑ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household* ☐ Qualifying widow(er)

* If the qualifying person is a child but not your dependent, see page 2 of the instructions.

Use Part II on the back to explain any changes		A. Original amount or as previously adjusted (see page 3)	B. Net change—amount of increase or (decrease)—explain in Part II	C. Correct amount
Income and Deductions (see instructions)				
1 Adjusted gross income (see page 3)	1			0.00
2 Itemized deductions or standard deduction (see page 3)	2			5,150.00
3 Subtract line 2 from line 1	3			-5,150.00
4 Exemptions. If changing, fill in Parts I and II on the back (see page 3)	4			3,300.00
5 Taxable income. Subtract line 4 from line 3	5			0.00
Tax Liability				
6 Tax (see page 4). Method used in col. C	6			0.00
7 Credits (see page 4)	7			0.00
8 Subtract line 7 from line 6. Enter the result but not less than zero	8			0.00
9 Other taxes (see page 4)	9			0.00
10 Total tax. Add lines 8 and 9	10			0.00
Payments				
11 Federal income tax withheld and excess social security and tier 1 RRTA tax withheld. If changing, see page 4	11			7,247.00
12 Estimated tax payments, including amount applied from prior year's return	12			0.00
13 Earned income credit (EIC)	13			0.00
14 Additional child tax credit from Form 8812	14			0.00
15 Credits from Form 2439, Form 4136, or Form 8885	15			0.00
16 Amount paid with request for extension of time to file (see page 4)	16			0.00
17 Amount of tax paid with original return plus additional tax paid after it was filed	17			8,391.12
18 Total payments. Add lines 11 through 17 in column C	18			15,638.12
Refund or Amount You Owe				
19 Overpayment, if any, as shown on original return or as previously adjusted by the IRS	19			0.00
20 Subtract line 19 from line 18 (see page 5)	20			15,638.12
21 **Amount you owe.** If line 10, column C, is more than line 20, enter the difference and see page 5	21			
22 If line 10, column C, is less than line 20, enter the difference	22			15,638.12
23 Amount of line 22 you want **refunded to you**	23			15,638.12
24 Amount of line 22 you want **applied to your** estimated tax	24			

Sign Here

Joint return? See page 2. Keep a copy for your records.

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

Richard L. Bristol — 8/26/16

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

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed), address, and ZIP code ▶		EIN	
		Phone no. ( )	

Part I Exemptions. See Form 1040 or 1040A instructions.

Complete this part **only** if you are:
- Increasing or decreasing the number of exemptions claimed on line 6d of the return you are amending, or
- Increasing or decreasing the exemption amount for housing individuals displaced by Hurricane Katrina.

		A. Original number of exemptions reported or as previously adjusted	B. Net change	C. Correct number of exemptions
25 Yourself and spouse . . . . **Caution.** If someone can claim you as a dependent, you cannot claim an exemption for yourself.	25			
26 Your dependent children who lived with you	26			
27 Your dependent children who did not live with you due to divorce or separation	27			
28 Other dependents	28			
29 Total number of exemptions. Add lines 25 through 28	29			
30 Multiply the number of exemptions claimed on line 29 by the amount listed below for the tax year you are amending. Enter the result here and on line 4.	30			
31 If you are claiming an exemption amount for housing individuals displaced by Hurricane Katrina, enter the amount from Form 8914, line 2 for 2005 or line 6 for 2006 (see instructions for line 4)	31			
32 Add lines 30 and 31. Enter the result here and on line 4	32			

Tax year	Exemption amount	But see the instructions for line 4 on page 3 if the amount on line 1 is over:
2006	$3,300	$112,875
2005	3,200	109,475
2004	3,100	107,025
2003	3,050	104,625

33 Dependents (children and other) not claimed on original (or adjusted) return:

(a) First name	Last name	(b) Dependent's social security number	(c) Dependent's relationship to you	(d) ✓ if qualifying child for child tax credit (see page 5)
				☐
				☐
				☐
				☐
				☐
				☐

No. of children on 33 who:
- lived with you . . ▶ ☐
- did not live with you due to divorce or separation (see page 5) . . ▶ ☐

Dependents on 33 not entered above ▶ ☐

Part II Explanation of Changes

Enter the line number from the front of the form for each item you are changing and give the reason for each change. Attach only the supporting forms and schedules for the items changed. If you do not attach the required information, your Form 1040X may be returned. Be sure to include your name and social security number on any attachments.

If the change relates to a net operating loss carryback or a general business credit carryback, attach the schedule or form that shows the year in which the loss or credit occurred. See page 2 of the instructions. Also, check here . . . . . . ▶ ☐

Lines 1, 3, 5, 6, 8, 10, 11 changed based on corrections to erroneous information returns. See attached form 4852.

Part III Presidential Election Campaign Fund. Checking below will not increase your tax or reduce your refund.

If you did not previously want $3 to go to the fund but now want to, check here . . . . ▶ ☐

If a joint return and your spouse did not previously want $3 to go to the fund but now wants to, check here . . . . ▶ ☐

Form **4852**
(Rev. December 2005)
Department of the Treasury
Internal Revenue Service

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.**

OMB No. 1545-0074

1 Type or print your first name and middle initial.	Last name	2 Social security number (SSN)
Richard L	Bristol	[redacted]

3 Address
[redacted]. South Jordan, UT 84095

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 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)
[redacted] Company, [redacted], Mesa, AZ 85210	[redacted]

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

a	Wages, tips, and other compensation	0.00	g	State income tax withheld	0.00
b	Social security wages	0.00		(Name of state)	
c	Medicare wages and tips	0.00	h	Local income tax withheld	0.00
d	Advance EIC payment	0.00		(Name of locality)	
e	Social security tips	0.00	i	Social security tax withheld	3,178.00
f	Federal income tax withheld	3,326.00	j	Medicare tax withheld	743.00

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	☐	6	Local income tax withheld	
	Total distribution	☐	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?
Amounts were determined from the W-2 issued by payer listed on line 5 herein. Payer erroneously alleged IRC section 3121(a) and IRC section 3401(a) transactions. This claim is hereby rebutted. I am a private sector worker and payer is a private sector company not engaged in a privileged activity. The amounts on line 7(a-j) herein are to the best of my knowledge and belief, true, correct and complete.

9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
Not required

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 ▶ Richard L. Bristol Date ▶ 8/26/16

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c and 1099-R and is completed by taxpayers or their representatives when (a) their employer or payer does not give them a Form W-2 or Form 1099-R and (b) when an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to your income tax return.

You should always attempt to get Form W-2 or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. After February 14th, you may call the IRS at 1-800-829-1040 if you still have not received Form W-2 or Form 1099-R. Generally, do not file Form 4852 before April 15th. Employees affected by Hurricanes Katrina, Rita, and Wilma should call the IRS at 1-866-562-5227 for additional guidance.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note. Retain a copy of Form 4852 for your records. Check your Social Security statement (received at least a full year after the date shown on Line 4) against Form 4852. If the earnings you reported on Form 4852 are not shown in the statement, you should contact SSA at the telephone number shown on the statement.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R, after your return is filed with Form 4852, and the information differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return.

[redacted]

SOUTH JORDAN UT 84095-8565

United States Treasury

DATE 2/5/16

PAY TO THE ORDER OF United States Treasury $ 8,391.12

Eight Thousand Three Hundred Ninety one and 12/100 DOLLARS

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