COVER PAGE

Filing Checklist for 2019 Tax Return Filed On Standard Forms

Prepared on: 01/25/2020 01:34:35 am

Return: C:\Users\david\Documents\HRBlock\DAVID WHITEHOUSE 2019 Tax Return.T19

To file your 2019 tax return, simply follow these instructions:

Step 1. Sign and date the return

Because you're filing a joint return, DAVID and JOANNE both need to sign the tax return.

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2. Assemble the return

These forms should be assembled behind Form 1040 --U.S. Individual Income Tax Return

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (Wal-Mart Associates, Inc.)

Form 1099-R: Distributions from Pensions, etc.

2nd (Bank of America)

Step 3. Mail the return

Mail the return to this address:

Department of the Treasury
Internal Revenue Service
Austin, TX 73301-0002

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.

- DHL Express, Express 9:00, Express 10:30, Express 12:00, Express Worldwide, Express Envelope, Import Express 10:30, Import Express 12:00, and Import Express Worldwide.

- FedEx First Overnight, Priority Overnight, Standard Overnight, 2 Day, International Next Flight Out, International Priority, International First, or International Economy.

- UPS Next Day Air Early A.M., Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 4. Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- - Background Worksheet
- - Last Year's Data Worksheet
- - Social Security Worksheet

2019 return information - Keep this for your records

Here is some additional information about your 2019 return. Keep this information with your records.

You will need your 2019 AGI to electronically sign your return next year.

Quick Summary

Income		$29,093
Adjustments	-	$0
Adjusted gross income		**$29,093**
Deductions	-	$27,000
Taxable income		**$2,093**
Tax withheld or paid already		$513
Actual tax due	-	$209
Refund applied to next year	-	$0
Refund		**$304**

Form **1040-SR** Department of the Treasury—Internal Revenue Service (99) **U.S. Tax Return for Seniors** **2019** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.

☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS)
☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)

If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. ▶

Your first name and middle initial	Last name	Your social security number
DAVID W	WHITEHOUSE	006-38-9671
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
JOANNE L	WHITEHOUSE	005-44-6345

Home address (number and street). If you have a P.O. box, see instructions. 4000 ST GEORGES ROAD - APT 104A | Apt. no.

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. ☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). ORMOND BEACH FL 32174

Foreign country name | Foreign province/state/county | Foreign postal code

If more than four dependents, see inst. and ✓ here ▶ ☐

Standard Deduction **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** ☒ Were born before January 2, 1955 ☐ Are blind
Spouse: ☒ Was born before January 2, 1955 ☐ Is blind

Dependents (see instructions):

(1) First name Last name	(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see inst.): Child tax credit	Credit for other dependents
			☐	☐
			☐	☐
			☐	☐
			☐	☐

Attach Schedule B if required.

1	Wages, salaries, tips, etc. Attach Form(s) W-2				1	20,744
2a	Tax-exempt interest	2a	0	b Taxable interest	2b	0
3a	Qualified dividends	3a	0	b Ordinary dividends	3b	0
4a	IRA distributions	4a		b Taxable amount	4b	0
c	Pensions and annuities	4c		d Taxable amount	4d	3,778
5a	Social security benefits	5a	33,240	b Taxable amount	5b	4,571
6	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐				6	0
7a	Other income from Schedule 1, line 9				7a	0
b	Add lines 1, 2b, 3b, 4b, 4d, 5b, 6, and 7a. This is your **total income** ▶				7b	29,093
8a	Adjustments to income from Schedule 1, line 22				8a	0
b	Subtract line 8a from line 7b. This is your **adjusted gross income** ▶				8b	29,093
9	**Standard deduction or itemized deductions** (from Schedule A)	9	27,000			
10	Qualified business income deduction. Attach Form 8995 or Form 8995-A	10	0			
11a	Add lines 9 and 10				11a	27,000
b	**Taxable income.** Subtract line 11a from line 8b. If zero or less, enter -0-				11b	2,093

Standard Deduction See *Standard Deduction Chart* below.

Standard Deduction Chart* Add the number of boxes checked in the "Age/Blindness" section of *Standard Deduction* ▶ 2

IF your filing status is. . .	AND the number of boxes checked is. . .	THEN your standard deduction is. . .	IF your filing status is. . .	AND the number of boxes checked is. . .	THEN your standard deduction is. . .
Single	1	13,850	Head of household	1	20,000
	2	15,500		2	21,650
Married filing jointly or Qualifying widow(er)	1	25,700	Married filing separately	1	13,500
	2	27,000		2	14,800
	3	28,300		3	16,100
	4	29,600		4	17,400

*Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

12a	**Tax** (see instructions). Check if any from: 1 ☐ Form(s) 8814 2 ☐ Form 4972 3 ☐	12a 209		
b	Add Schedule 2, line 3, and line 12a and enter the total ▶		12b	209
13a	Child tax credit or credit for other dependents	13a		
b	Add Schedule 3, line 7, and line 13a and enter the total ▶		13b	0
14	Subtract line 13b from line 12b. If zero or less, enter -0-		14	209
15	Other taxes, including self-employment tax, from Schedule 2, line 10		15	0
16	Add lines 14 and 15. This is your **total tax** ▶		16	209
17	Federal income tax withheld from Forms W-2 and 1099		17	513
18	Other payments and refundable credits:			
a	Earned income credit (EIC) NO	18a		
b	Additional child tax credit. Attach Schedule 8812	18b		
c	American opportunity credit from Form 8863, line 8	18c		
d	Schedule 3, line 14	18d 0		
e	Add lines 18a through 18d. These are your **total other payments and refundable credits** ▶		18e	0
19	Add lines 17 and 18e. These are your **total payments** ▶		19	513
Refund 20	If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you **overpaid**		20	304
21a	Amount of line 20 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐		21a	304
Direct deposit? See instructions. ▶ b	Routing number 063107513 ▶ c Type: ☒ Checking ☐ Savings			
▶ d	Account number 1010019910484			
22	Amount of line 20 you want **applied to your 2020 estimated tax** ▶	22 0		
Amount You Owe 23	**Amount you owe.** Subtract line 19 from line 16. For details on how to pay, see instructions ▶		23	
24	Estimated tax penalty (see instructions) ▶	24		

- If you have a qualifying child, attach Sch. EIC.
- If you have nontaxable combat pay, see instructions.

Third Party Designee (Other than paid preparer)

Do you want to allow another person (other than your paid preparer) to discuss this return with the IRS? See instructions. ☐ **Yes.** Complete below. ☒ **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 instructions. Keep a copy for your records.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		Retail Sales	
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		Self	

Phone no. 386-677-3888 Email address david@tntsouth.com

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ 3rd Party Designee ☐ Self-employed
Firm's name ▶			Phone no.	
Firm's address ▶			Firm's EIN ▶	