

Filing Checklist for 2013 Tax Return Filed On Standard Forms

Prepared on: 04/06/2014 12:52:37 pm

Return: C:\Documents and Settings\Joanne\My Documents\HRBlock\DAVID WHITEHOUSE 2013 Tax Return.T13

To file your 2013 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

- Schedule C-EZ

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 Same Day Service.
- FedEx Priority Overnight, Standard Overnight, 2Day, International Priority, or International First.
- United Parcel Service 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

2013 return information - Keep this for your records

Here is some additional information about your 2013 return. Keep this information with your records.

You will need your 2013 AGI to electronically sign your return next year.

Quick Summary

Income		\$20,739
Adjustments	-	\$0
Adjusted gross income		\$20,739
Deductions	-	\$14,600
Exemption(s)	-	\$7,800
Taxable income		\$0
Tax withheld or paid already		\$447
Actual tax due	-	\$0
Refund applied to next year	-	\$0
Refund		\$447

For the year Jan. 1–Dec. 31, 2013, or other tax year beginning _____, 2013, ending _____, 20

See separate instructions.

Your first name and initial: DAVID W Last name: WHITEHOUSE Your social security number: 006-38-9671

If a joint return, spouse's first name and initial: JOANNE L Last name: WHITEHOUSE Spouse's social security number: 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. **▲ Make sure the SSN(s) above and on line 6c are correct.**

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

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

Filing Status

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 instr.) If the qualifying person is a child but not your dependent, enter this child's name here.

5 Qualifying widow(er) with dependent child

Check only one box.

Exemptions

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

b Spouse

Dependents:

(1) First name	Last name	(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)

If more than four dependents, see instructions and check here

d Total number of exemptions claimed 2

Boxes checked on 6a and 6b: 2

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: 2

Income	7	8a	8b	9a	9b	10	11	12	13	14	15a	15b	16a	16b	17	18	19	20a	20b	21	22
Wages, salaries, tips, etc. Attach Form(s) W-2	15,849																				
Taxable interest. Attach Schedule B if required	0																				
Tax-exempt interest. Do not include on line 8a			0																		
Ordinary dividends. Attach Schedule B if required																					
Qualified dividends																					
Taxable refunds, credits, or offsets of state and local income taxes																					
Alimony received																					
Business income or (loss). Attach Schedule C or C-EZ								100													
Capital gain or (loss). Attach Schedule D if required. If not required, check here								0													
Other gains or (losses). Attach Form 4797																					
IRA distributions												0									
Pensions and annuities														3,440							
Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E																					
Farm income or (loss). Attach Schedule F																					
Unemployment compensation																					
Social security benefits																		30,622		1,350	
Other income. List type and amount																					
Combine the amounts in the far right column for lines 7 through 21. This is your total income																					20,739

Adjusted Gross Income	23	24	25	26	27	28	29	30	31a	32	33	34	35	36	37
Educator expenses	0														
Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	0														
Health savings account deduction. Attach Form 8889	0														
Moving expenses. Attach Form 3903	0														
Deductible part of self-employment tax. Attach Schedule SE	0														
Self-employed SEP, SIMPLE, and qualified plans	0														
Self-employed health insurance deduction	0														
Penalty on early withdrawal of savings	0														
Alimony paid Recipient's SSN	0														
IRA deduction	0														
Student loan interest deduction	0														
Tuition and fees. Attach Form 8917.	0														
Domestic production activities deduction. Attach Form 8903	0														
Add lines 23 through 35														0	
Subtract line 36 from line 22. This is your adjusted gross income															20,739

Tax and Credits

Table with 3 columns: Line number, Description, and Amount. Includes lines 38-55 for 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, \$6,100

Married filing jointly or Qualifying widow(er), \$12,200

Head of household, \$8,950

Other Taxes

Table with 3 columns: Line number, Description, and Amount. Includes lines 56-61 for Other Taxes.

Payments

If you have a qualifying child, attach Schedule EIC.

Table with 3 columns: Line number, Description, and Amount. Includes lines 62-72 for Payments.

Refund

Direct deposit? See instructions.

Table with 3 columns: Line number, Description, and Amount. Includes lines 73-75 for Refund.

Amount You Owe

Table with 3 columns: Line number, Description, and Amount. Includes lines 76-77 for Amount You Owe.

Third Party Designee

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

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.

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

Signature lines for Taxpayer and Spouse, including Date and Occupation fields.

Paid Preparer Use Only

Fields for Preparer's name, signature, date, firm's name, EIN, and phone number.

**SCHEDULE C-EZ
(Form 1040)**

Net Profit From Business

OMB No. 1545-0074

(Sole Proprietorship)

2013

Department of the Treasury
Internal Revenue Service (99)

- ▶ Partnerships, joint ventures, etc., generally must file Form 1065 or 1065-B.
- ▶ Attach to Form 1040, 1040NR or 1041. ▶ See instructions on page 2.

Attachment
Sequence No. **09A**

Name of proprietor

JOANNE L WHITEHOUSE

Social security number (SSN)

005-44-6345

Part I General Information

**You May Use
Schedule C-EZ
Instead of
Schedule C
Only If You:**

- Had business expenses of \$5,000 or less.
- Use the cash method of accounting.
- Did not have an inventory at any time during the year.
- Did not have a net loss from your business.
- Had only one business as either a sole proprietor, qualified joint venture, or statutory employee.

And You:

- Had no employees during the year.
- Are not required to file **Form 4562**, Depreciation and Amortization, for this business. See the instructions for Schedule C, line 13, to find out if you must file.
- Do not deduct expenses for business use of your home.
- Do not have prior year unallowed passive activity losses from this business.

A Principal business or profession, including product or service Tax Preparation	B Enter business code (see page 2) ▶ 541213
C Business name. If no separate business name, leave blank. David & Joanne Whitehouse	D Enter your EIN (see page 2)
E Business address (including suite or room no.). Address not required if same as on page 1 of your tax return. 4000 St Georges Rd - 104A City, town or post office, state, and ZIP code Ormond Beach, FL 32174 FL 32175-1507	
F Did you make any payments in 2013 that would require you to file Form(s) 1099? (see the Schedule C instructions) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
G If "Yes," did you or will you file required Forms 1099? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Part II Figure Your Net Profit

1 Gross receipts. Caution. If this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked, see <i>Statutory Employees</i> in the instructions for Schedule C, line 1, and check here <input type="checkbox"/>	1	120
2 Total expenses (see page 2). If more than \$5,000, you must use Schedule C	2	20
3 Net profit. Subtract line 2 from line 1. If less than zero, you must use Schedule C. Enter on both Form 1040, line 12 , and Schedule SE, line 2 , or on Form 1040NR, line 13 and Schedule SE, line 2 (see instructions). (Statutory employees do not report this amount on Schedule SE, line 2.) Estates and trusts, enter on Form 1041, line 3	3	100

Part III Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 2.

4 When did you place your vehicle in service for business purposes? (month, day, year) ▶ _____

5 Of the total number of miles you drove your vehicle during 2013, enter the number of miles you used your vehicle for:

a Business _____ **b** Commuting (see page 2) _____ **c** Other _____

6 Was your vehicle available for personal use during off-duty hours? Yes No

7 Do you (or your spouse) have another vehicle available for personal use? Yes No

8a Do you have evidence to support your deduction? Yes No

b If "Yes," is the evidence written? Yes No

KIA For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule C-EZ (Form 1040) 2013