

# Electronic Filing Instructions for your 2009 Federal Tax Return

Important: Your taxes are not finished until all required steps are completed.



Billy Bollocks  
3254 main  
storrs, CT 06269

<b>Balance Due/Refund</b>	Your federal tax return (Form 1040) shows a refund due to you in the amount of \$2,430.00. Your tax refund should be mailed to you by check within three to four weeks after your return is accepted.																		
<b>Where's My Refund?</b>	Before you call the Internal Revenue Service with questions about your refund, give them three to four weeks processing time from the date your return is accepted. If then you have not received your refund, or the amount is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check <a href="http://www.irs.gov">www.irs.gov</a> and select the "Where's my refund?" link.																		
<b>No Signature Document Needed</b>	No signature form is required since you signed your return electronically.																		
<b>What You Need to Keep</b>	Your Electronic Filing Instructions (this form) Printed copy of your federal return																		
<b>2009 Federal Tax Return Summary</b>	<table><tr><td>Adjusted Gross Income</td><td>\$</td><td>10,206.00</td></tr><tr><td>Taxable Income</td><td>\$</td><td>0.00</td></tr><tr><td>Total Tax</td><td>\$</td><td>217.00</td></tr><tr><td>Total Payments/Credits</td><td>\$</td><td>2,647.00</td></tr><tr><td>Amount to be Refunded</td><td>\$</td><td>2,430.00</td></tr><tr><td>Effective Tax Rate</td><td></td><td>-2.42%</td></tr></table>	Adjusted Gross Income	\$	10,206.00	Taxable Income	\$	0.00	Total Tax	\$	217.00	Total Payments/Credits	\$	2,647.00	Amount to be Refunded	\$	2,430.00	Effective Tax Rate		-2.42%
Adjusted Gross Income	\$	10,206.00																	
Taxable Income	\$	0.00																	
Total Tax	\$	217.00																	
Total Payments/Credits	\$	2,647.00																	
Amount to be Refunded	\$	2,430.00																	
Effective Tax Rate		-2.42%																	

## Consent to Use Your Tax Return Information

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Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Before we continue, we need your permission to check your tax return to see if you are eligible for certain options in our program. Specifically, we would like to check your age, whether you have a refund and the amount, your state of residence, and whether you are a U.S. Resident.

### The following statements apply:

I authorize Intuit, the maker of TurboTax to use the 2009 tax return information described above to determine my eligibility to place all or a portion of my refund on a debit card.

Sign this agreement by entering your name:

<u>Billy</u>	<u>Bollocks</u>
Taxpayer's First Name	Taxpayer's Last Name
Billy Bollocks	

_____	_____
Spouse's First Name (if applicable)	Spouse's Last Name (if applicable)

Enter today's date:

07/16/2010  
Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

# We Need Your Consent to Use Your Tax Return Information

The IRS requires that we obtain your consent to use specific information in your tax return to determine if you can use this payment method.

## Protecting Your Privacy

Because you have selected this payment option, Intuit, the maker of TurboTax software, needs to check a few items in your return to determine whether you can pay your fees from your refund. For example, you must reside in the U.S. and your refund must be large enough to make the payment.

We're asking your permission to perform these checks and providing some important information to you as required by the IRS. To agree, simply enter your name(s) and the date in the boxes below after reading the consent and select 'I Agree'.

I authorize Intuit, the maker of TurboTax, to use the information provided in this 2009 return to determine whether a portion of the refund can be used to pay for tax preparation.

IRS regulations require the following statements:

'Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.'

<u>Billy</u>	<u>Bollocks</u>
Taxpayer's First Name	Taxpayer's Last Name
Billy Bollocks	
_____	_____
Spouse's First Name (if applicable)	Spouse's Last Name (if applicable)

Please type the date below:

07/16/2010  
Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

## Finally, We Need Your Consent to Disclose Some Tax Information

Before we continue with processing your payment by transferring money from your tax refund, we need to ask for your permission again, this time to forward certain of your information to Metabank ('META') and to Santa Barbara Tax Processing Group ('SBTPG'), the administrator and servicer of your tax refund transfer. To consent, type your first and last name and today's date in the boxes below.

### How This Protects Your Privacy

Because you are choosing to pay for your tax preparation with money from your refund, Intuit, the maker of TurboTax software, needs to send a limited amount of personal information from your tax return (such as your identifying information, deposit information and refund amount) to META and SBTPG, the administrator and servicer of payment for tax preparation services from your tax refund. Your information is sent via a secure SSL encrypted transmission for the sole purpose of refund processing tax preparation service payment. META and SBTPG are contractually obligated to protect the confidentiality of your information.

We're asking your permission to disclose that information and also providing some important information to you as requested by the IRS. To agree, simply enter your name(s) and date in the boxes below after reading this consent and select "I Agree".

I authorize Intuit, the maker of TurboTax, to disclose to META and SBTPG that portion of my 2009 tax return information that is necessary to enable META and SBTPG to process my refund and pay for my tax preparation.

IRS regulations require the following statements:

"Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year."

Billy

Taxpayer First Name

Bollocks

Taxpayer Last Name

\_\_\_\_\_  
Spouse First Name (if applicable)

\_\_\_\_\_  
Spouse Last Name (if applicable)

Please type the date below:

07/16/2010

Date

If you believe that your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

Label (See instructions.)

Use the IRS label. Otherwise, please print or type.

Presidential Election Campaign

For the year Jan 1 - Dec 31, 2009, or other tax year beginning , 2009, ending , 20
Your first name MI Last name
Billy Bollocks
OMB No. 1545-0074
Your social security number
506-16-3313
If a joint return, spouse's first name MI Last name
Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions. Apartment no.
3254 main
You must enter your social security number(s) above.
City, town or post office. If you have a foreign address, see instructions. State ZIP code
storrs CT 06269
Checking a box below will not change your tax or refund.
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund? (see instructions) . . . . . 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 & full name here.
4 [X] 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
5 Qualifying widow(er) with dependent child (see instructions)

Exemptions

If more than four dependents, see instructions and check here

6a [X] Yourself. If someone can claim you as a dependent, do not check box 6a.
b Spouse
c Dependents:
(1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) [X] if qualifying child for child tax credit (see instrs)
Zbigniew Bollocks 656-12-3313 Son
d Total number of exemptions claimed . . . . . 2

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 . DCB . . . . . 7 10,206.
8a Taxable interest. Attach Schedule B if required . . . . . 8a
8b Tax-exempt interest. Do not include on line 8a . . . . . 8b
9a Ordinary dividends. Attach Schedule B if required . . . . . 9a
9b Qualified dividends (see instrs) . . . . . 9b
10 Taxable refunds, credits, or offsets of state and local income taxes (see instructions) . . . . . 10
11 Alimony received. . . . . 11
12 Business income or (loss). Attach Schedule C or C-EZ . . . . . 12
13 Capital gain or (loss). Att Sch D if reqd. If not reqd, ck here . . . . . 13
14 Other gains or (losses). Attach Form 4797 . . . . . 14
15a IRA distributions . . . . . 15a b Taxable amount (see instrs) . . . . . 15b
16a Pensions and annuities . . . . . 16a b Taxable amount (see instrs) . . . . . 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 in excess of \$2,400 per recipient (see instructions) . . . . . 19
20a Social security benefits . . . . . 20a b Taxable amount (see instrs) . . . . . 20b
21 Other income . . . . . 21
22 Add the amounts in the far right column for lines 7 through 21. This is your total income . . . . . 22 10,206.

Adjusted Gross Income

23 Educator expenses (see instructions) . . . . . 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 instructions) . . . . . 29
30 Penalty on early withdrawal of savings . . . . . 30
31a Alimony paid b Recipient's SSN . . . . . 31a
32 IRA deduction (see instructions) . . . . . 32
33 Student loan interest deduction (see instructions) . . . . . 33
34 Tuition and fees deduction. Attach Form 8917 . . . . . 34
35 Domestic production activities deduction. Attach Form 8903 . . . . . 35
36 Add lines 23 - 31a and 32 - 35 . . . . . 36
37 Subtract line 36 from line 22. This is your adjusted gross income . . . . . 37 10,206.

Tax and Credits

Standard Deduction for -

People who check any box on line 39a, 39b, or 40b or who can be claimed as a dependent, see instructions.

All others:

Single or Married filing separately, \$5,700

Married filing jointly or Qualifying widow(er), \$11,400

Head of household, \$8,350

Table with 3 columns: Line number, Description, and Amount. Includes lines 38-55 for Tax and Credits.

Other Taxes

Table with 3 columns: Line number, Description, and Amount. Includes lines 56-60 for Other Taxes.

Payments

If you have a qualifying child, attach Schedule EIC.

Table with 3 columns: Line number, Description, and Amount. Includes lines 61-71 for Payments.

Refund

Direct deposit? See instructions and fill in 73b, 73c, and 73d or Form 8888.

Table with 3 columns: Line number, Description, and Amount. Includes lines 72-74 for Refund.

Amount You Owe

Table with 3 columns: Line number, Description, and Amount. Includes lines 75-76 for Amount You Owe.

Third Party Designee

Form for Third Party Designee with fields for name, phone, and PIN.

Sign Here

Joint return? See instructions.

Keep a copy for your records.

Signature area with fields for signature, date, and occupation.

Paid Preparer's Use Only

Form for Paid Preparer's Use Only with fields for signature, date, and firm name.

**Child and Dependent Care Expenses**

Department of the Treasury  
Internal Revenue Service (99)

▶ **Attach to Form 1040, Form 1040A, or Form 1040NR.**  
▶ **See separate instructions.**

**2010**  
Attachment  
Sequence No. **21**

Name(s) shown on return

Billy Bollocks

Your social security number

506-16-3313

**Part I** **Persons or Organizations Who Provided the Care** — You must complete this part.  
(If you have more than two care providers, see the instructions.)

1	(a) Care provider's name	(b) Address (no., street, apt no., city, state, and ZIP code)	(c) Identifying no. (SSN or EIN)	(d) Amount paid (see instructions)

Did you receive dependent care benefits?	No	Yes	Complete only Part II below.	Complete Part III on page 2 next.
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**Caution.** If the care was provided in your home, you may owe employment taxes. If you do, you cannot file Form 1040A. For details, see the instructions for Form 1040, line 59, or Form 1040NR, line 58.

**Part II** **Credit for Child and Dependent Care Expenses**

**2** Information about your **qualifying person(s)**. If you have more than two qualifying persons, see the instructions.

(a) Qualifying person's name		(b) Qualifying person's social security number	(c) Qualified expenses you incurred and paid in 2010 for the person listed in column (a)
First	Last		

<b>3</b> Add the amounts in column (c) of line 2. <b>Do not</b> enter more than \$3,000 for one qualifying person or \$6,000 for two or more persons. If you completed Part III, enter the amount from line 31 . . . . .	<b>3</b>																																																												
<b>4</b> Enter your <b>earned income</b> . See instructions . . . . .	<b>4</b>																																																												
<b>5</b> If married filing jointly, enter your spouse's earned income (if your spouse was a student or was disabled, see the instructions); <b>all others</b> , enter the amount from line 4 . . . . .	<b>5</b>																																																												
<b>6</b> Enter the <b>smallest</b> of line 3, 4, or 5 . . . . .	<b>6</b>																																																												
<b>7</b> Enter the amount from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37 . . . . .	<b>7</b>																																																												
<b>8</b> Enter on line 8 the decimal amount shown below that applies to the amount on line 7	<b>8</b>																																																												
<table border="0"> <tr> <td colspan="3"><b>If line 7 is:</b></td> <td colspan="3"><b>If line 7 is:</b></td> </tr> <tr> <td><b>Over</b></td> <td><b>But not over</b></td> <td><b>Decimal amount is</b></td> <td><b>Over</b></td> <td><b>But not over</b></td> <td><b>Decimal amount is</b></td> </tr> <tr> <td>\$0 – 15,000</td> <td></td> <td>.35</td> <td>\$29,000 – 31,000</td> <td></td> <td>.27</td> </tr> <tr> <td>15,000 – 17,000</td> <td></td> <td>.34</td> <td>31,000 – 33,000</td> <td></td> <td>.26</td> </tr> <tr> <td>17,000 – 19,000</td> <td></td> <td>.33</td> <td>33,000 – 35,000</td> <td></td> <td>.25</td> </tr> <tr> <td>19,000 – 21,000</td> <td></td> <td>.32</td> <td>35,000 – 37,000</td> <td></td> <td>.24</td> </tr> <tr> <td>21,000 – 23,000</td> <td></td> <td>.31</td> <td>37,000 – 39,000</td> <td></td> <td>.23</td> </tr> <tr> <td>23,000 – 25,000</td> <td></td> <td>.30</td> <td>39,000 – 41,000</td> <td></td> <td>.22</td> </tr> <tr> <td>25,000 – 27,000</td> <td></td> <td>.29</td> <td>41,000 – 43,000</td> <td></td> <td>.21</td> </tr> <tr> <td>27,000 – 29,000</td> <td></td> <td>.28</td> <td>43,000 – No limit</td> <td></td> <td>.20</td> </tr> </table>	<b>If line 7 is:</b>			<b>If line 7 is:</b>			<b>Over</b>	<b>But not over</b>	<b>Decimal amount is</b>	<b>Over</b>	<b>But not over</b>	<b>Decimal amount is</b>	\$0 – 15,000		.35	\$29,000 – 31,000		.27	15,000 – 17,000		.34	31,000 – 33,000		.26	17,000 – 19,000		.33	33,000 – 35,000		.25	19,000 – 21,000		.32	35,000 – 37,000		.24	21,000 – 23,000		.31	37,000 – 39,000		.23	23,000 – 25,000		.30	39,000 – 41,000		.22	25,000 – 27,000		.29	41,000 – 43,000		.21	27,000 – 29,000		.28	43,000 – No limit		.20	<b>8</b> X
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<b>9</b> Multiply line 6 by the decimal amount on line 8. If you paid 2009 expenses in 2010, see the instructions . . . . .	<b>9</b>																																																												
<b>10</b> Tax liability limit. Enter the amount from the Credit Limit Worksheet in the instructions . . . . .	<b>10</b>																																																												
<b>11</b> <b>Credit for child and dependent care expenses.</b> Enter the <b>smaller</b> of line 9 or line 10 here and on Form 1040, line 48; Form 1040A, line 29; or Form 1040NR, line 46 . . . . .	<b>11</b>																																																												

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

**Part III Dependent Care Benefits**

12	Enter the total amount of <b>dependent care benefits</b> you received in 2010. Amounts you received as an employee should be shown in box 10 of your Form(s) W-2. <b>Do not</b> include amounts reported as wages in box 1 of Form(s) W-2. If you were self-employed or a partner, include amounts you received under a dependent care assistance program from your sole proprietorship or partnership . . . . .	12	104.
13	Enter the amount, if any, you carried over from 2009 and used in 2010 during the grace period. See instructions . . . . .	13	
14	Enter the amount, if any, you forfeited or carried forward to 2011. See instructions . . . . .	14	
15	Combine lines 12 through 14. See instructions . . . . .	15	104.
16	Enter the total amount of <b>qualified expenses</b> incurred in 2010 for the care of the <b>qualifying person(s)</b> . . . . .	16	
17	Enter the <b>smaller</b> of line 15 or 16. . . . .	17	0.
18	Enter your <b>earned income</b> . See instructions . . . . .	18	10,102.
19	Enter the amount shown below that applies to you. <ul style="list-style-type: none"> <li>• If married filing jointly, enter your spouse's earned income (if your spouse was a student or was disabled, see the instructions for line 5).</li> <li>• If married filing separately, see the instructions.</li> <li>• All others, enter the amount from line 18.</li> </ul>	19	10,102.
20	Enter the <b>smallest</b> of line 17, 18, or 19 . . . . .	20	0.
21	Enter \$5,000 (\$2,500 if married filing separately <b>and</b> you were required to enter your spouse's earned income on line 19) . . . . .	21	5,000.
22	Is any amount on line 12 from your sole proprietorship or partnership? (Form 1040A filers go to line 25). <input checked="" type="checkbox"/> <b>No.</b> Enter -0-. <input type="checkbox"/> <b>Yes.</b> Enter the amount here . . . . .	22	0.
23	Subtract line 22 from line 15 . . . . .	23	
24	<b>Deductible benefits.</b> Enter the <b>smallest</b> of line 20, 21, or 22. Also, include this amount on the appropriate line(s) of your return. See instructions. . . . .	24	
25	<b>Excluded benefits. Form 1040 and 1040NR filers:</b> If you checked 'No' on line 22, enter the smaller of line 20 or line 21. Otherwise, subtract line 24 from the smaller of line 20 or line 21. If zero or less, enter -0-. <b>Form 1040A filers:</b> Enter the <b>smaller</b> of line 20 or line 21 . . . . .	25	0.
26	<b>Taxable benefits. Form 1040 and 1040NR filers:</b> Subtract line 25 from line 23. If zero or less, enter -0-. Also, include this amount on Form 1040, line 7, or Form 1040NR, line 8. On the dotted line next to Form 1040, line 7, or Form 1040NR, line 8, enter 'DCB.' <b>Form 1040A filers:</b> Subtract line 25 from line 15. Also, include this amount on Form 1040A, line 7. In the space to the left of line 7, enter 'DCB' . . . . .	26	104.

To claim the child and dependent care credit, complete lines 27 through 31 below.

27	Enter \$3,000 (\$6,000 if two or more qualifying persons) . . . . .	27	
28	<b>Form 1040 and 1040NR filers:</b> Add lines 24 and 25. <b>Form 1040A filers:</b> Enter the amount from line 25 . . . . .	28	
29	Subtract line 28 from line 27. If zero or less, <b>stop.</b> You cannot take the credit. <b>Exception.</b> If you paid 2009 expenses in 2010, see the instructions for line 9 . . . . .	29	
30	Complete line 2 on page 1 of this form. <b>Do not</b> include in column (c) any benefits shown on line 28 above. Then, add the amounts in column (c) and enter the total here . . . . .	30	
31	Enter the <b>smaller</b> of line 29 or 30. Also, enter this amount on line 3 on page 1 of this form and complete lines 4 through 11 . . . . .	31	



**Social Security and Medicare Tax  
on Unreported Tip Income**

Department of the Treasury  
Internal Revenue Service (99)

▶ **See instructions.**  
▶ **Attach to Form 1040, Form 1040NR, Form 1040NR-EZ, Form 1040-SS, or Form 1040-PR.**

**2010**  
Attachment  
Sequence No. **24**

Name of person who received tips. If married, complete a separate Form 4137 for each spouse with unreported tips.

**Social security number**  
506-16-3313

1	(a) Name of employer to whom you were required to, but did not report all your tips (see instructions)	(b) Employer identification number (see instructions)	(c) Total cash and charge tips you received (including unreported tips) (see instructions)	(d) Total cash and charge tips you reported to your employer
<b>A</b>	Job #1	11-1111100	203.	101.
<b>B</b>				
<b>C</b>				
<b>D</b>				
<b>E</b>				

<b>2</b>	Total cash and charge tips you <b>received</b> in 2010. Add the amounts from line 1, column (c) . . . . .	<b>2</b>	203.	
<b>3</b>	Total cash and charge tips you <b>reported</b> to your employer(s) in 2010. Add the amounts from line 1, column (d) . . . . .	<b>3</b>		101.
<b>4</b>	Subtract line 3 from line 2. This amount is income you <b>must</b> include in the total on Form 1040, line 7; Form 1040NR, line 8; or Form 1040NR-EZ, line 3. . . . .	<b>4</b>		102.
<b>5</b>	Cash and charge tips you received but did not report to your employer because the total was less than \$20 in a calendar month (see instructions) . . . . .	<b>5</b>		
<b>6</b>	Unreported tips subject to Medicare tax. Subtract line 5 from line 4 . . . . .	<b>6</b>		102.
<b>7</b>	Maximum amount of wages (including tips) subject to social security tax . . . . .	<b>7</b>	106,800.	
<b>8</b>	Total social security wages and social security tips (total of boxes 3 and 7 shown on your Form(s) W-2) or railroad retirement (tier 1) compensation . . . . .	<b>8</b>	10,102.	
<b>9</b>	Subtract line 8 from line 7. If line 8 is more than line 7, enter -0- here and on line 10 and go to line 12. . . . .	<b>9</b>		96,698.
<b>10</b>	Unreported tips subject to social security tax. Enter the <b>smaller</b> of line 6 or line 9. If you received tips as a federal, state, or local government employee, see instructions . . . . .	<b>10</b>		102.
<b>11</b>	Multiply line 10 by .062 (social security tax rate) . . . . .	<b>11</b>		6.
<b>12</b>	Multiply line 6 by .0145 (Medicare tax rate) . . . . .	<b>12</b>		1.
<b>13</b>	Add lines 11 and 12. Enter the result here and on Form 1040, line 57; Form 1040NR, line 55; or Form 1040NR-EZ, line 16 (Form 1040-SS and 1040-PR filers, see instructions.) . . . . . ▶	<b>13</b>		7.

Name(s) shown on return

Billy Bollocks

Your social security number

506-16-3313

**Part I All Filers**

<b>1</b>	<b>1040 filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040, line 51). <b>1040A filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040A, line 33). <b>1040NR filers:</b> Enter the amount from line 6 of your Child Tax Credit Worksheet (see the Instructions for Form 1040NR, line 47).  If you used Pub 972, enter the amount from line 8 of the worksheet on page 4 of the publication.		<b>1</b>	1,000.
<b>2</b>	Enter the amount from Form 1040, line 51, Form 1040A, line 33, or Form 1040NR, line 47 . . . . .		<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1. If zero, <b>stop</b> ; you cannot take this credit . . . . .		<b>3</b>	1,000.
<b>4 a</b>	Earned income (see instructions) . . . . .	<b>4 a</b>		10,206.
<b>b</b>	Nontaxable combat pay (see instructions) . . . . .	<b>4 b</b>		
<b>5</b>	Is the amount on line 4a more than \$3,000? <input type="checkbox"/> <b>No.</b> Leave line 5 blank and enter -0- on line 6. <input checked="" type="checkbox"/> <b>Yes.</b> Subtract \$3,000 from the amount on line 4a. Enter the result . . . . .	<b>5</b>		7,206.
<b>6</b>	Multiply the amount on line 5 by 15% (.15) and enter the result . . . . . <b>Next.</b> Do you have three or more qualifying children? <input checked="" type="checkbox"/> <b>No.</b> If line 6 is zero, <b>stop</b> ; you cannot take this credit. Otherwise, skip Part II and enter the <b>smaller</b> of line 3 or line 6 on line 13. <input type="checkbox"/> <b>Yes.</b> If line 6 is equal to or more than line 3, skip Part II and enter the amount from line 3 on line 13. Otherwise, go to line 7.	<b>6</b>		1,081.

**Part II Certain Filers Who Have Three or More Qualifying Children**

<b>7</b>	Withheld social security and Medicare taxes from Form(s) W-2, boxes 4 and 6. If married filing jointly, include your spouse's amounts with yours. If you worked for a railroad, see the instructions . . . . .	<b>7</b>		
<b>8</b>	<b>1040 filers:</b> Enter the total of the amounts from Form 1040, lines 27 and 57, plus any taxes that you identified using code 'UT' and entered on the dotted line next to line 60. <b>1040A filers:</b> Enter -0-. <b>1040NR filers:</b> Enter the total of the amounts from Form 1040NR, line 53, plus any taxes that you identified using code 'UT' and entered on the dotted line next to line 57.	<b>8</b>		
<b>9</b>	Add lines 7 and 8 . . . . .	<b>9</b>		
<b>10</b>	<b>1040 filers:</b> Enter the total of the amounts from Form 1040, lines 64a and 69. <b>1040A filers:</b> Enter the total of the amount from Form 1040A, line 41a, plus any excess social security and tier 1 RRTA taxes withheld that you entered to the left of line 44 (see instructions). <b>1040NR filers:</b> Enter the amount from Form 1040NR, line 63.	<b>10</b>		
<b>11</b>	Subtract line 10 from line 9. If zero or less, enter -0- . . . . .	<b>11</b>		
<b>12</b>	Enter the <b>larger</b> of line 6 or line 11 . . . . . <b>Next,</b> enter the <b>smaller</b> of line 3 or line 12 on line 13.	<b>12</b>		

**Part III Additional Child Tax Credit**

<b>13</b>	This is your additional child tax credit . . . . .	<b>13</b>		1,000.
-----------	--	-----------	--	--------

Enter this amount on  
Form 1040, line 65, or  
Form 1040A, line 42, or  
Form 1040NR, line 61.

**Credit for Prior Year Minimum Tax —  
Individuals, Estates, and Trusts**

Department of the Treasury  
Internal Revenue Service (99)

▶ See separate instructions. ▶ Attach to Form 1040, 1040NR, or 1041.

Attachment  
Sequence No. **74**

Name(s) shown on return

Billy Bollocks

Identifying number

506-16-3313

**Part I Net Minimum Tax on Exclusion Items**

1	Combine lines 1, 6, 7, and 11 of your 2008 Form 6251. Estates and trusts, see instructions . . . . .	1	0.
2	Enter adjustments and preferences treated as exclusion items (see instructions) . . . . .	2	
3	Minimum tax credit net operating loss deduction (see instructions) . . . . .	3	
4	Combine lines 1, 2, and 3. If zero or less, enter -0- here and on line 15 and go to Part II. If more than \$214,900 and you were married filing separately for 2008, see instructions . . . . .	4	0.
5	Enter: \$69,950 if married filing jointly or qualifying widow(er) for 2008; \$46,200 if single or head of household for 2008; or \$34,975 if married filing separately for 2008. Estates and trusts, enter \$22,500 . . . . .	5	
6	Enter: \$150,000 if married filing jointly or qualifying widow(er) for 2008; \$112,500 if single or head of household for 2008; or \$75,000 if married filing separately for 2008. Estates and trusts, enter \$75,000 . . . . .	6	
7	Subtract line 6 from line 4. If zero or less, enter -0- here and on line 8 and go to line 9 . . . . .	7	
8	Multiply line 7 by 25% (.25) . . . . .	8	
9	Subtract line 8 from line 5. If zero or less, enter -0-. If under age 24 at the end of 2008, see instructions . . . . .	9	
10	Subtract line 9 from line 4. If zero or less, enter -0- here and on line 15 and go to Part II. Form 1040NR filers, see instructions . . . . .	10	
11	<ul style="list-style-type: none"> <li>• If for 2008 you filed Form 2555 or 2555-EZ, see the instructions for the amount to enter.</li> <li>• If for 2008 you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b (Form 1041, line 2b(2)); or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (lines 14a and 15, column (2), of Schedule D (Form 1041)), complete Part III of Form 8801 and enter the amount from line 49 here. Form 1040NR filers, see instructions.</li> <li>• All others: If line 10 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 10 by 26% (.26). Otherwise, multiply line 10 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions.</li> </ul>	11	
12	Minimum tax foreign tax credit on exclusion items (see instructions). . . . .	12	
13	Tentative minimum tax on exclusion items. Subtract line 12 from line 11 . . . . .	13	
14	Enter the amount from your 2008 Form 6251, line 35, or 2008 Form 1041, Schedule I, line 55 . . . . .	14	
15	<b>Net minimum tax on exclusion items.</b> Subtract line 14 from line 13. If zero or less, enter -0- . . . . .	15	0.

**BAA For Paperwork Reduction Act Notice, see separate instructions.**

**Part II Current Year Nonrefundable and Refundable Credits and Carryforward to 2010**

16	Enter the amount from your 2008 Form 6251, line 36, or 2008 Form 1041, Schedule I, line 56 . . . . .	16	
17	Enter the amount from line 15 . . . . .	17	0.
18	Subtract line 17 from line 16. If less than zero, enter as a negative amount . . . . .	18	0.
19	<b>2008 credit carryforward.</b> Enter the amount from your 2008 Form 8801, line 31 . . . . .	19	37.
20	Enter your 2008 unallowed qualified electric vehicle credit (see instructions) . . . . .	20	
21	Combine lines 18 through 20. If zero or less, enter -0- . . . . .	21	37.
22	Enter 50% (.50) of the total interest and penalties you paid before October 3, 2008, on alternative minimum tax attributable to the exercise of incentive stock options for 2007 or any prior year . . . . .	22	
23	Add lines 21 and 22. If zero or less, <b>stop here</b> and see instructions . . . . .	23	37.
24	Enter your 2009 regular income tax liability minus allowable credits (see instructions) . . . . .	24	0.
25	Enter the amount from your 2009 Form 6251, line 34, or 2009 Form 1041, Schedule I, line 54 . . . . .	25	0.
26	Subtract line 25 from line 24. If zero or less, enter -0- . . . . .	26	0.
27	<b>Current year nonrefundable credit.</b> Enter the <b>smaller</b> of line 23 or line 26. Also enter this amount on your 2009 Form 1040, line 53 (check box <b>b</b> ); Form 1040NR, line 49 (check box <b>b</b> ); or Form 1041, Schedule G, line 2d . . . . .	27	0.
28	<p>• <b>Estates and trusts:</b> Leave lines 28 and 29 blank and go to line 30.</p> <p>• <b>Individuals:</b> Did you have a minimum tax credit carryforward to 2007 (on your 2006 Form 8801, line 26) or pay any interest or penalties before October 3, 2008, on alternative minimum tax attributable to the exercise of incentive stock options for 2007 or any prior year?</p> <p><input checked="" type="checkbox"/> <b>No.</b> Leave lines 28 and 29 blank and go to line 30.</p> <p><input type="checkbox"/> <b>Yes.</b> Complete Part IV of Form 8801 to figure the amount to enter . . . . .</p>	28	
29	<p>Is line 28 more than line 27?</p> <p><input checked="" type="checkbox"/> <b>No.</b> Leave line 29 blank and go to line 30.</p> <p><input type="checkbox"/> <b>Yes.</b> Subtract line 27 from line 28. This is your <b>current year refundable credit</b>. Enter the result here and on your 2009 Form 1040, line 70 (check box <b>c</b>), or Form 1040NR, line 64 (check box <b>c</b>) . . . . .</p>	29	
30	<b>Credit carryforward to 2010.</b> Subtract the larger of line 27 or line 28 from line 23. Keep a record of this amount because you may use it in future years. . . . .	30	37.

**Part III Tax Computation Using Maximum Capital Gains Rates**

<p><b>Caution.</b> If you did not complete the 2008 Qualified Dividends and Capital Gain Tax Worksheet, the 2008 Schedule D Tax Worksheet, or Part V of the 2008 Schedule D (Form 1041), see the instructions before completing this part.</p>		
31	Enter the amount from Form 8801, line 10. If you filed Form 2555 or 2555-EZ for 2008, enter the amount from line 3 of the worksheet in the instructions . . . . .	31
<p><b>Caution.</b> If for 2008 you filed Form 1040NR, 1041, 2555, or 2555-EZ, see instructions before completing lines 32, 33, and 34.</p>		
32	Enter the amount from line 6 of your 2008 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 13 of your 2008 Schedule D Tax Worksheet, or the amount from line 22 of the 2008 Schedule D (Form 1041), whichever applies.* . . . . .	32
<p><b>If you figured your 2008 tax using the 2008 Qualified Dividends and Capital Gain Tax Worksheet, skip line 33 and enter the amount from line 32 on line 34. Otherwise, go to line 33.</b></p>		
33	Enter the amount from line 19 of your 2008 Schedule D (Form 1040), or line 14b, column (2), of the 2008 Schedule D (Form 1041) . . . . .	33
34	Add lines 32 and 33, and enter the <b>smaller</b> of that result or the amount from line 10 of your 2008 Schedule D Tax Worksheet . . . . .	34
35	Enter the <b>smaller</b> of line 31 or line 34. . . . .	35
36	Subtract line 35 from line 31 . . . . .	36
37	If line 36 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions . . . . . ▶	37
38	Enter: <ul style="list-style-type: none"> <li>• \$65,100 if married filing jointly or qualifying widow(er) for 2008,</li> <li>• \$32,550 if single or married filing separately for 2008,</li> <li>• \$43,650 if head of household for 2008, or</li> <li>• \$2,200 for an estate or trust</li> </ul> Form 1040NR filers, see instructions . . . . .	38
39	Enter the amount from line 7 of your 2008 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 14 of your 2008 Schedule D Tax Worksheet, or the amount from line 23 of the 2008 Schedule D (Form 1041), whichever applies. If you did not complete either worksheet or Part V of the 2008 Schedule D (Form 1041), enter -0-. Form 1040NR filers, see instructions . . . . .	39
40	Subtract line 39 from line 38. If zero or less, enter -0- . . . . .	40
41	Enter the <b>smaller</b> of line 31 or line 32. . . . .	41
42	Enter the <b>smaller</b> of line 40 or line 41. . . . .	42
43	Subtract line 42 from line 41 . . . . .	43
44	Multiply line 43 by 15% (.15) . . . . . ▶	44
<p><b>If line 33 is zero or blank, skip lines 45 and 46 and go to line 47. Otherwise, go to line 45.</b></p>		
45	Subtract line 41 from line 35 . . . . .	45
46	Multiply line 45 by 25% (.25) . . . . . ▶	46
47	Add lines 37, 44, and 46 . . . . .	47
48	If line 31 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 31 by 26% (.26). Otherwise, multiply line 31 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions . . . . .	48
49	Enter the <b>smaller</b> of line 47 or line 48 here and on line 11. If you filed Form 2555 or 2555-EZ for 2008, do not enter this amount on line 11. Instead, enter it on line 4 of the worksheet in the instructions . . . . .	49

\* The 2008 Qualified Dividends and Capital Gain Tax Worksheet is in the 2008 Instructions for Form 1040. The 2008 Schedule D Tax Worksheet is in the 2008 Instructions for Schedule D (Form 1040) (2008 Instructions for Form 1041).

**Part IV** Tentative Refundable Credit

<b>50</b> Enter the amount from line 21 . . . . .				<b>50</b>
<b>51</b> Enter the total of lines 18 and 20 from your 2007 Form 8801. If zero or less, enter -0- . . . . .	<b>51</b>			
<b>52</b> Enter the total of lines 18 and 20 from your 2008 Form 8801. If zero or less, enter -0- . . . . .	<b>52</b>			
<b>53</b> Enter the total of lines 18 and 20 from your 2009 Form 8801. If zero or less, enter -0- . . . . .	<b>53</b>			
<b>54</b> Add lines 51 through 53 . . . . .				<b>54</b>
<b>55</b> <b>Long-term unused minimum tax credit.</b> Subtract line 54 from line 50 (If zero or less, <b>stop</b> ; enter -0- here and on line 59 and go to line 60) . . . . .				<b>55</b>
<b>56</b> Multiply line 55 by 50% (.50) . . . . .				<b>56</b>
<b>57</b> Enter the amount from your 2008 Form 8801, line 61 . . . . .				<b>57</b>
<b>58</b> Enter the <b>larger</b> of line 56 or line 57 . . . . .				<b>58</b>
<b>59</b> Enter the <b>smaller</b> of line 55 or line 58. . . . .				<b>59</b>
<b>60</b> Enter the amount from line 22 . . . . .				<b>60</b>
<b>61</b> Add lines 59 and 60. Enter the result here and on line 28 . . . . .				<b>61</b>

**SCHEDULE M**  
**(Form 1040A or 1040)**

**Making Work Pay and Government Retiree Credits**

OMB No. 1545-0074

**2009**

Department of the Treasury  
Internal Revenue Service (99)

▶ **Attach to Form 1040A, 1040, or 1040NR.**

▶ **See separate instructions.**

Attachment  
Sequence No. **166**

Name(s) shown on return

Billy Bollocks

Your social security number

506-16-3313

**1 a Important:** See the instructions if you can be claimed as someone else's dependent or are filing Form 1040NR. Check the 'No' box below and see the instructions if **(a)** you have a net loss from a business, **(b)** you received a taxable scholarship or fellowship grant not reported on a Form W-2, **(c)** your wages include pay for work performed while an inmate in a penal institution, **(d)** you received a pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan, or **(e)** you are filing Form 2555 or 2555-EZ.

Do you (and your spouse if filing jointly) have 2009 wages of more than \$6,451 (\$12,903 if married filing jointly)?

**Yes.** Skip lines 1a through 3. Enter \$400 (\$800 if married filing jointly) on line 4 and go to line 5.

**No.** Enter your earned income (see instructions) . . . . . **1 a**

**b** Nontaxable combat pay included on line 1a (see instructions) . . . . . **1 b**

**2** Multiply line 1a by 6.2% (.062) . . . . . **2**

**3** Enter \$400 (\$800) if married filing jointly) . . . . . **3**

**4** Enter the **smaller** of line 2 or line 3 (unless you checked 'Yes' on line 1a) . . . . . **4** 400.

**5** Enter the amount from Form 1040, line 38\*, or Form 1040A, line 22 . . . . . **5** 10,206.

**6** Enter \$75,000 (\$150,000 if married filing jointly) . . . . . **6** 75,000.

**7** Is the amount on line 5 more than the amount on line 6?

**No.** Skip line 8. Enter the amount from line 4 on line 9 below.

**Yes.** Subtract line 6 from line 5 . . . . . **7**

**8** Multiply line 7 by 2% (.02) . . . . . **8**

**9** Subtract line 8 from line 4. If zero or less, enter -0- . . . . . **9** 400.

**10** Did you (or your spouse, if filing jointly) receive an economic recovery payment in 2009? You may have received this payment if you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits (see instructions).

**No.** Enter -0- on line 10 and go to line 11.

**Yes.** Enter the total of the payments received by you (and your spouse, if filing jointly). Do not enter more than \$250 (\$500 if married filing jointly) . . . . . **10** 0.

**11** Did you (or your spouse, if filing jointly) receive a pension or annuity in 2009 for services performed as an employee of the U.S. Government or any U.S. state or local government from work **not** covered by social security? Do not include any pension or annuity reported on Form W-2.

**No.** Enter -0- on line 11 and go to line 12.

**Yes.** • If you checked 'No' on line 10, enter \$250 (\$500 if married filing jointly and the answer on line 11 is 'Yes' for both spouses) . . . . . **11** 0.

• If you checked 'Yes' on line 10, enter -0- (exception: enter \$250 if filing jointly and the spouse who received the pension or annuity did not receive an economic recovery payment described on line 10)

**12** Add lines 10 and 11 . . . . . **12** 0.

**13** Subtract line 12 from line 9. If zero or less, enter -0- . . . . . **13** 400.

**14 Making work pay and government retiree credits.** Add lines 11 and 13. Enter the result here and on Form 1040, line 63, Form 1040A, line 40; or Form 1040NR, line 60 . . . . . **14** 400.

\*If you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico, see instructions.





# Federal Carryover Worksheet

**2009**

▶ Keep for your records

Name(s) Shown on Return <u>Billy Bollocks</u>	Social Security Number <u>506-16-3313</u>
--	--

**2008 State and Local Income Tax Information** (See Tax Help)

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With- held/Pmts	(e) Paid With Return	(f) Total Over- payment	(g) Applied Amount
CT						
<b>Totals . .</b>						

Other Tax and Income Information			2008	2009
1	Filing status . . . . .	1	4 <u>HH</u>	4 <u>HH</u>
2	Number of exemptions for blind or over 65 (0 - 4) . . . . .	2		
3	Itemized deductions after limitation . . . . .	3	0.	1,100.
4	Check box if required to itemize deductions . . . . .	4	<input type="checkbox"/>	<input type="checkbox"/>
5	Adjusted gross income . . . . .	5		10,206.
6	Tax liability for Form 2210 or Form 2210-F . . . . .	6	0.	0.
7	Alternative minimum tax . . . . .	7		
8	Federal overpayment applied to next year estimated tax . . . . .	8		

**QuickZoom to the IRA Information Worksheet for IRA information** . . . . . ▶

Excess Contributions			2008	2009
9 a	Taxpayer's excess Archer MSA contributions as of 12/31 . . . . .	9 a		
b	Spouse's excess Archer MSA contributions as of 12/31 . . . . .	b		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31 . . . . .	10 a		
b	Spouse's excess Coverdell ESA contributions as of 12/31 . . . . .	b		
11 a	Taxpayer's excess HSA contributions as of 12/31 . . . . .	11 a		
b	Spouse's excess HSA contributions as of 12/31 . . . . .	b		

Loss and Expense Carryovers			2008	2009
12 a	Short-term capital loss . . . . .	12 a		
b	AMT Short-term capital loss . . . . .	b		
13 a	Long-term capital loss . . . . .	13 a		
b	AMT Long-term capital loss . . . . .	b		
14 a	Net operating loss available to carry forward . . . . .	14 a		
b	AMT Net operating loss available to carry forward . . . . .	b		
15 a	Investment interest expense disallowed . . . . .	15 a		
b	AMT Investment interest expense disallowed . . . . .	b		
16	Nonrecaptured net Section 1231 losses from:	16 a		
a	2009 . . . . .	a		
b	2008 . . . . .	b		
c	2007 . . . . .	c		
d	2006 . . . . .	d		
e	2005 . . . . .	e		
f	2004 . . . . .	f		

Billy Bollocks

506-16-3313

Loss and Expense Carryovers (cont'd)				2008	2009
17	AMT Nonrecap'd net Sec 1231 losses from:	a	2009 . . .	17 a	
		b	2008 . . .	b	
		c	2007 . . .	c	
		d	2006 . . .	d	
		e	2005 . . .	e	
		f	2004 . . .	f	
<b>Credit Carryovers</b>				<b>2008</b>	<b>2009</b>
18	General business credit . . . . .		18		
19	Adoption credit from:	a	2009 . . . . .	19 a	
		b	2008 . . . . .	b	
		c	2007 . . . . .	c	
		d	2006 . . . . .	d	
		e	2005 . . . . .	e	
		f	2004 . . . . .	f	
20	Mortgage interest credit from:	a	2009 . . . . .	20 a	
		b	2008 . . . . .	b	
		c	2007 . . . . .	c	
		d	2006 . . . . .	d	
21	Credit for prior year minimum tax . . . . .		21	37.	37.
22	District of Columbia first-time homebuyer credit . . . . .		22		
23	Residential energy efficient property credit . . . . .		23		
<b>Other Carryovers</b>				<b>2008</b>	<b>2009</b>
24	Section 179 expense deduction disallowed . . . . .		24		
25	Excess foreign housing deduction:	a	Taxpayer (Form 2555, line 46) . . . . .	25 a	
		b	Taxpayer (Form 2555, line 48) . . . . .	b	
		c	Spouse (Form 2555, line 46) . . . . .	c	
		d	Spouse (Form 2555, line 48) . . . . .	d	

Billy Bollocks

506-16-3313

**Charitable Contribution Carryovers**

<b>26</b>	<b>2008</b> Carryover of charitable contributions from:	<b>Other Property</b>		<b>Capital Gain</b>	
		<b>(a)</b> 50%	<b>(b)</b> 30%	<b>(c)</b> 30%	<b>(d)</b> 20%
	<b>a</b> 2008 . . . . .				
	<b>b</b> 2007 . . . . .				
	<b>c</b> 2006 . . . . .				
	<b>d</b> 2005 . . . . .				
	<b>e</b> 2004 . . . . .				

<b>27</b>	<b>2009</b> Carryover of charitable contributions from:	<b>Other Property</b>		<b>Capital Gain</b>	
		<b>(a)</b> 50%	<b>(b)</b> 30%	<b>(c)</b> 30%	<b>(d)</b> 20%
	<b>a</b> 2009 . . . . .				
	<b>b</b> 2008 . . . . .				
	<b>c</b> 2007 . . . . .				
	<b>d</b> 2006 . . . . .				
	<b>e</b> 2005 . . . . .				

**28** Amount overpaid less earned income credit . . . . . 0.

**2008 State Capital Loss Carryovers** (For users **not** transferring from the prior year)

State ID	Short-term Capital Loss for State	AMT Short-term Capital Loss for State	Long-term Capital Loss for State	AMT Long-term Capital Loss for State	Capital Loss (combined) for State	AMT Capital Loss (combined) for State

# File by Mail Instructions for your 2009 Connecticut Tax Return

Important: Your taxes are not finished until all required steps are completed.



(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Billy Bollocks  
3254 MAIN  
STORRS, CT 06269

<b>Balance Due/Refund</b>	Your Connecticut state tax return (Form CT-1040) shows no balance due or refund amount.									
<b>What You Need to Mail</b>	<p>Your tax return - The official return for mailing is included in this printout. Remember to sign and date the return.</p> <p>Mail your return to: Department of Revenue Services PO Box 5002 Hartford, CT 06102-5002</p> <p>Deadline: Postmarked by April 15, 2010</p> <p>Don't forget correct postage on the envelope.</p>									
<b>What You Need to Keep</b>	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select Print & File tab, then select the Print for Your Records category.									
<b>2009 Connecticut Tax Return Summary</b>	<table><tr><td>Taxable Income</td><td>\$</td><td>10,206.00</td></tr><tr><td>Total Tax</td><td>\$</td><td>0.00</td></tr><tr><td>No Refund or Amount Due</td><td>\$</td><td>0.00</td></tr></table>	Taxable Income	\$	10,206.00	Total Tax	\$	0.00	No Refund or Amount Due	\$	0.00
Taxable Income	\$	10,206.00								
Total Tax	\$	0.00								
No Refund or Amount Due	\$	0.00								
<b>Changed Your Mind About e-filing?</b>	You can still file electronically. Just go back to TurboTax, select the Print & File tab, then select the E-file category. We'll walk you through the process. Once you file, we will let you know if your return is accepted (or rejected) by the state taxing agency.									

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**Form CT-1040 - 2009**, Page 1 of 4  
**Connecticut Resident Income Tax Return**

Other taxable year, beginning: **2009** and ending:

N S N FJFC N FJC N FSFC N FSC Y HH N QW

506 - 16 - 3313

BILLY BOLLOCKS N Dec.  
N Dec.

3254 MAIN N No forms N CT-2210  
CT-8379 CT-1040 CRC

STORRS CT 06269 •

1 Federal adjusted gross income (from federal Form 1040, Line 37; Form 1040A, Line 21; or Form 1040EZ, Line 4)	1	10206
2 Additions to federal adjusted gross income (from Schedule 1, Line 39)	2	0
3 Add Line 1 and Line 2	3	10206
4 Subtractions from federal adjusted gross income (from Schedule 1, Line 50)	4	0
5 <b>Connecticut adjusted gross income:</b> Line 4 subtracted from Line 3	5	10206
6 Income tax	6	0
7 Credit for income taxes paid to qualifying jurisdictions (from Schedule 2, Line 59)	7	0
8 Line 7 subtracted from Line 6. If Line 7 is greater than Line 6, '0' is entered	8	0
9 Connecticut alternative minimum tax (from Form CT-6251)	9	0
10 Add Line 8 and Line 9	10	0
11 Credit for property taxes paid on your primary residence, motor vehicle, or both (from Schedule 3, Line 68)	11	0
12 Subtract Line 11 from Line 10. If less than zero, '0' is entered	12	0
13 Adjusted net Connecticut minimum tax credit (from Form CT-8801)	13	0
14 <b>Connecticut income tax:</b> Line 13 subtracted from line 12. If less than zero, '0' is entered	14	0
15 Individual use tax (from Schedule 4, Line 69). If no tax is due, '0' is entered	15	0
16 <b>Total tax:</b> Add Line 14 and Line 15	16	0

Do not send W2 or 1099 forms  
 here



17 Enter amount from Line 16

17 • 0

W-2, W-2G, and 1099 Information

Col. A - Employer or Payer's Fed. ID No.

Column B - CT Wages, Tips, etc.

Column C - CT Income Tax Withheld

18 a	•	0	0
18 b	•	0	0
18 c	•	0	0
18 d	•	0	0
18 e	•	0	0
18 f	•	0	0
18 g	•	0	0

18 h Additional Connecticut withholding (from Supplemental Schedule CT-1040WH, Line 3) 18 h 0

18 Total Connecticut income tax withheld: Amounts in Column C 18 0

19 All 2009 estimated tax payments and any overpayments applied from a prior year 19 0

20 Payments made with Form CT-1040 EXT 20 0

21 Total payments: Add Lines 18, 19, and 20 21 0

22 Overpayment: If Line 21 is more than Line 17, Line 17 subtracted from Line 21 22 0

23 Amount of Line 22 you want applied to your 2010 estimated tax 23 0

24 Total Contributions of Refund to Designated Charities (from Schedule 5, Line 70) 24 0

25 Refund: Lines 23 and 24 subtracted from Line 22 25 0

25 a Acct. type Ck. Sv. 25 b Rout. # 25 c Acct.#

25 d Refund going to a bank account outside the U.S. 25 d

26 Tax due: If Line 17 is more than Line 21, Line 21 subtracted from Line 17 26 0

27 If late: Penalty entered. Line 26 multiplied by 10% (.10) 27 0

28 If late: Interest entered. Line 26 multiplied by number of months or fraction of a month late, then by 1% (.01) 28 0

29 Interest on underpayment of estimated tax (from Form CT-2210) 29 0

30 Total amount due: Add Lines 26 through 29 30 0

Declaration: I declare under penalty of law that I have examined this return (including any accompanying schedules and statements) and, to the best of my knowledge and belief, it is true, complete, and correct. I understand the penalty for willfully delivering a false return or document to DRS is a fine of not more than \$5,000, or imprisonment for not more than five years, or both. The declaration of a paid preparer other than the taxpayer is based on all information of which the preparer has any knowledge.

CTIA0112 02/16/10

Sign Here	Your Signature		Date	Daytime Telephone Number
	Spouse's Signature (if joint return)		Date	Daytime Telephone Number
	Paid Preparer's Signature		Date	Telephone Number
	Firm's Name, Address, and ZIP code		Preparer's SSN or PTIN	
Keep a copy for your records.	Self-Prepared			FEIN

Third Party Designee - Complete the following to authorize DRS to contact another person about this return.

Designee's Name	Telephone Number	Personal Identification Number (PIN)
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Schedule 1 - Modifications to Federal Adjusted Gross Income

31	Interest on state and local government obligations other than Connecticut	31	0
32	Mutual fund exempt-interest dividends from non-Connecticut state or municipal government obligations	32	0
33	Cancellation of debt income	33	0
34	Taxable amount of lump-sum distributions from qualified plans not included in federal adjusted gross income	34	0
35	Beneficiary's share of Connecticut fiduciary adjustment: Enter only if greater than zero	35	0
36	Loss on sale of Connecticut state and local government bonds	36	0
37	Domestic production activities	37	0
38	Other — specify	38	0
39	<b>Total additions:</b> Add Lines 31 through 38	39	0
40	Interest on U.S. government obligations	40	0
41	Exempt dividends from certain qualifying mutual funds derived from U.S. government obligations	41	0
42	Social Security benefit adjustment (from Social Security Benefit Adjustment Worksheet)	42	0
43	Refunds of state and local income taxes	43	0
44	Tier 1 and Tier 2 railroad retirement benefits and supplemental annuities	44	0
45	50% of military retirement pay	45	0
46	Beneficiary's share of Connecticut fiduciary adjustment: Enter only if less than zero	46	0
47	Gain on sale of Connecticut state and local government bonds	47	0
48	Connecticut Higher Education Trust (CHET) contributions Acct#:	48	0
49	Other — specify: Do not include out of state income	49	0
50	<b>Total subtractions:</b> Add Lines 40 through 49	50	0

Schedule 2 — Credit for Income Taxes Paid to Qualifying Jurisdictions

51	Modified Connecticut adjusted gross income	51	0
		<b>Col. A</b>	<b>Col. B</b>
52	Enter qualifying jurisdiction's name and two-letter code	52	
53	Non-Connecticut income included on Line 51 and reported on a qualifying jurisdiction's income tax return	53	0
54	Divide Line 53 by Line 51	54	0.0000
55	Income tax liability: Line 11 subtracted from Line 6	55	0
56	Line 54 multiplied by Line 55	56	0
57	Income tax paid to a qualifying jurisdiction	57	0
58	Lesser of Line 56 or Line 57	58	0
59	<b>Total credit:</b> Add Line 58, all columns	59	0

Schedule 3 – Property Tax Credit

	<i>Qualifying Property Primary Residence</i>		<b>Auto 1</b>		<b>Auto 2</b>
Name of Connecticut Tax Town or District	●		●		●
Description of Property	●		●		●
Date(s) Paid	●		●		●
	●		●		●
<b>Amount Paid</b>	█ 60	0	61	0	62
<b>63 Total property tax paid:</b> Add Lines 60, 61, and 62.			█		63
<b>64 Maximum property tax credit allowed</b>					64 ● 500
<b>65</b> Lesser of Line 63 or Line 64					65 ● 0
<b>66</b> Property tax credit limitation amount. If zero, the amount from Line 65 is entered on Line 68					66 ●
<b>67</b> Line 65 multiplied by Line 66					67 ● 0
<b>68</b> Line 67 subtracted from Line 65			█		68 0

Schedule 4 – Individual Use Tax

	<i>Column A</i>	<i>Column B</i>	<i>Column C</i>	<i>Column D</i>	<i>Column E</i>	<i>Column F</i>	<i>Column G</i>
●				0	0	0	0
●				0	0	0	0
●				0	0	0	0
●				0	0	0	0
●				0	0	0	0
●				0	0	0	0
●				0	0	0	0
<b>69 Individual use tax:</b> Add amounts for Column G						█	69 ● 0

Schedule 5 – Contributions to Designated Charities

<b>70 a</b> AIDS Research						<b>70 a</b>	0
<b>70 b</b> Organ Transplant						<b>70 b</b>	0
<b>70 c</b> Endangered Species/Wildlife						<b>70 c</b>	0
<b>70 d</b> Breast Cancer Research						<b>70 d</b>	0
<b>70 e</b> Safety Net Services						<b>70 e</b>	0
<b>70 f</b> Military Family Relief Fund						<b>70 f</b>	0
<b>70 Total Contributions:</b> Add Lines 70a through 70f						█	<b>70 ●</b> 0