

**KARL MARX B & KARA BRYANT
123 ELM
PLUCKEMIN, NJ 07978
2015 INCOME TAX RETURN**

PRACTICE LAB
 15 PRACTICE LAB WAY
 WASHINGTON DC 20005
 (202) 202-2022

KARL R MARX B &
 KARA B BRYANT
 123 ELM
 PLUCKEMIN NJ 07978
 (973) 555-1234

Preparer No.: 995
 Client No. : XXX-XX-0002
 Invoice Date: 11/23/2016

INVOICE

Description	Amount
PREPARATION OF 2015 FEDERAL/STATE FORMS & WORKSHEETS: FORM 1040 SCHEDULE A (ITEMIZED DEDUCTIONS) SCHEDULE A MEDICAL BREAKDOWN SCHEDULE A CONTRIBUTION WORKSHEET SCHEDULE B (INTEREST & DIVIDENDS) SCHEDULE C (BUSINESS PROFIT/LOSS) SCHEDULE D (CAPITAL GAINS & LOSS) FORM 8949 (SALES OF CAPITAL ASSETS) (3) CAPITAL GAIN TAX WORKSHEET SCHEDULE E (SUPPLEMENTAL INCOME) SCHEDULE SE (SELF-EMPLOYMENT TAX) FORM W-2 (WAGES AND TAX) (2) FORM W-2G (GAMBLING WINNINGS) (2) FORM 1099-C (CANCELLATION OF DEBT) FORM 1099-G (UNEMPLOYMENT COMPENSATION) FORM 1099-R (RETIREMENT DISTRIBUTIONS) (4) SIMPLIFIED GENERAL RULE WORKSHEET SSA WORKSHEET FORM 2441 (CHILD CARE CREDIT) FORM 5695 (RESIDENTIAL ENERGY CREDIT) FORM 8879 (E-FILE SIGNATURE AUTHORIZATION) CHILD TAX CREDIT WORKSHEET FORM 8863 (EDUCATION CREDIT) FORM 8962 (PREMIUM TAX CREDIT) FORM 8965 (HEALTH COVERAGE EXEMPTIONS) SHARED RESPONSIBILITY PAYMENT WKS STUDENT LOAN INTEREST WORKSHEET IRA WORKSHEET NJ STATE RESIDENT RETURN	
	Total Invoice
	\$0.00
	Amount Paid
	\$0.00
	Balance Due
	\$0.00

TAX YEAR: 2015

PROCESS DATE: 11/23/2016

CLIENT : 881-00-0002 KARL R MARX B
SPOUSE : 882-00-0002 KARA B BRYANT

BIRTH DATE : 07/28/1944
BIRTH DATE : 01/15/1954

ADDRESS : 123 ELM
: PLUCKEMIN NJ 07978

PREPARER : 995

Phone #1: (973) 555-1234
Phone #2: (862) 555-5678
Phone #3: -
STATUS : 2
FED TYPE: Electronic Mail
ST TYPE : Regular Tax
E-MAIL : NONE@TAXSLAYERPRO.COM

PREPARER FEE:
ELECTRONIC :
TOTAL FEES :

<u>DEPENDENT NAME</u>	<u>BIRTH DATE</u>	<u>SSN</u>	<u>RELATIONSHIP</u>	<u>MONTHS</u>
KENDRA KENT	10/13/1994	883-00-0002	DAUGHTER	12
DAVID THOMAS	05/08/2010	884-00-0002	GRANDCHILD	12
CARMEN BRYANT	01/01/1952	880-00-0002	SISTER	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040
FORM W-2
FORM W-2G
FORM 1099-C (CANCELLATION OF DEBT)
FORM 1099-G (UNEMPLOYMENT COMPENSATION)
FORM SSA-1099 (SOCIAL SECURITY BENEFITS)
FORM 1099-R (RETIREMENT DISTRIBUTIONS)
SCHEDULE A (ITEMIZED DEDUCTIONS)
SCHEDULE B (INTEREST/DIVIDEND INCOME)
SCHEDULE C (BUSINESS INCOME)
SCHEDULE D (CAPITAL GAINS/LOSSES)
SCHEDULE E (SUPPLEMENTAL INCOME/LOSS)
SCHEDULE SE (SELF EMPLOYMENT TAX)
FORM 2441 (CHILD CARE CREDIT)
FORM 5695 (RESIDENTIAL ENERGY CREDITS)
CHILD TAX CREDIT WORKSHEET
FORM 8863 (EDUCATION CREDITS)
FORM 8949 (SALES AND OTHER DISPOSITIONS OF CAPITAL ASSETS)
FORM 8962 (PREMIUM TAX CREDIT)
FORM 8965 (HEALTH COVERAGE EXEMPTIONS)
SHARED RESPONSIBILITY PAYMENT WORKSHEET
STUDENT LOAN INTEREST DEDUCTION WORKSHEET
IRA DEDUCTION WORKSHEET
NJ STATE RESIDENT RETURN

CLIENT : KARL MARX B
SPOUSE : KARA BRYANT

881-00-0002
882-00-0002

PREPARER : 995 DATE : 11/23/2016

LISTING OF FORMS FOR THIS RETURN

* QUICK SUMMARY *

<u>SUMMARY</u>	<u>FEDERAL</u>	<u>NJ RESIDENT</u>
FILING STATUS	2	2
TOTAL INCOME	87365	71339
TOTAL ADJUSTMENTS	7221	0
ADJUSTED GROSS INCOME	80144	52211
DEDUCTIONS	26936	26388
EXEMPTIONS	20000	8500
TAXABLE INCOME	33208	17323
TAX	4009	327
CREDITS	3029	0
PAYMENTS	7143	2957
OTHER TAXES	630	0
EARNED INCOME CREDIT	0	0
REFUND	5533	2630
AMOUNT DUE	0	0

* W-2 INCOME FORMS SUMMARY *

	<u>T/S</u>	<u>EMPLOYER</u>	<u>WAGES</u>	<u>FED WITH</u>	<u>FICA</u>	<u>MED TAX</u>	<u>STATE WITH</u>	<u>ST</u>
1.	S	ACME SCHOOL	13817	987	857	200	693	NJ
2.	T	ACME CORP	28134	2176	1927	451	1674	NJ
		TOTALS.....	41951	3163	2784	651	2367	

* W-2G INCOME FORMS SUMMARY *

	<u>[T/S]</u>	<u>PAYER</u>	<u>GROSS WINNING</u>	<u>FED WITH</u>	<u>STATE WITH</u>	<u>ST</u>
1.	S	NEW JERSEY LOTTERY	200	0	0	
2.	S	ACME CASINO	1100	110	0	
		TOTALS.....	1300	110	0	

* FORM 1099-G INCOME FORMS SUMMARY *

	<u>[T/S]</u>	<u>PAYER</u>	<u>UNEMPLOYMENT</u>	<u>FED WITH</u>	<u>STATE WITH</u>	<u>ST</u>
1.	S	NEW JERSEY DEPARTMENT OF LABOR	2550	120	0	
		TOTALS.....	2550	120	0	

CLIENT : KARL MARX B
SPOUSE : KARA BRYANT

881-00-0002
882-00-0002

PREPARER : 995 DATE : 11/23/2016

LISTING OF FORMS FOR THIS RETURN

* 1099-R INCOME FORMS SUMMARY *

	<u>[T/S]</u>	<u>PAYER</u>	<u>GROSS DIST</u>	<u>TAXABLE AMT</u>	<u>FED WITH</u>	<u>STATE WITH</u>
1.	T	ACME IRAS	838	838	0	0
2.	T	ACME TRUST	11755	0	0	0
3.	T	DEFENSE FINANCE &	1200	1200	0	0
4.	T	ACME PENSIONS	18625	18290	1715	0
		TOTALS.....	32418	20328	1715	0

* FORM SSA-1099 INCOME FORMS SUMMARY *

	<u>[T/S]</u>	<u>PAYER</u>	<u>SSA BENEFITS</u>	<u>FED WITH</u>
1.	T	U.S.	13682	360
		TOTALS.....	13682	360

		a Employee's social security number 882-00-0002		OMB No. 1545-0008		This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.			
b Employer identification number (EIN) 93-1009999				1 Wages, tips, other compensation 13817		2 Federal income tax withheld 987			
c Employer's name, address, and ZIP code ACME SCHOOL 123 MAIN PLUCKEMIN NJ 07978				3 Social security wages 13817		4 Social security tax withheld 857			
				5 Medicare wages and tips 13817		6 Medicare tax withheld 200			
				7 Social security tips		8 Allocated tips			
d Control number				9		10 Dependent care benefits			
e Employee's first name and initial KARA B		Last name BRYANT		Suff.		11 Nonqualified plans		12a See instructions for box 12	
123 ELM PLUCKEMIN NJ 07978				13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b			
				14 Other WD HC 59 DI 35 FLI 12		12c			
						12d			
f Employee's address and ZIP code									
15 State NJ	Employer's state ID number 889009999		16 State wages, tips, etc. 13817	17 State income tax 693	18 Local wages, tips, etc.	19 Local income tax	20 Locality name		

		a Employee's social security number 881-00-0002		OMB No. 1545-0008		This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.			
b Employer identification number (EIN) 91-1009999				1 Wages, tips, other compensation 28134		2 Federal income tax withheld 2176			
c Employer's name, address, and ZIP code ACME CORP 123 MAIN PLUCKEMIN NJ 07978				3 Social security wages 31088		4 Social security tax withheld 1927			
				5 Medicare wages and tips 31088		6 Medicare tax withheld 451			
				7 Social security tips		8 Allocated tips			
d Control number				9		10 Dependent care benefits			
e Employee's first name and initial KARL R		Last name MARX B		Suff.		11 Nonqualified plans		12a See instructions for box 12	
123 ELM PLUCKEMIN NJ 07978				13 Statutory employee <input type="checkbox"/> Retirement plan <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b		D 2954	
				14 Other DI 73 WD HC 125 FLI 26		12c		DD 3252	
						12d			
f Employee's address and ZIP code									
15 State NJ	Employer's state ID number 888009999		16 State wages, tips, etc. 29334	17 State income tax 1674	18 Local wages, tips, etc.	19 Local income tax	20 Locality name		

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning _____, 2015, ending _____, 20

Your first name and initial: **KARL R** Last name: **MARX B** Your social security number: **881-00-0002**

If a joint return, spouse's first name and initial: **KARA B** Last name: **BRYANT** Spouse's social security number: **882-00-0002**

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.: **123 ELM**

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). **PLUCKEMIN, NJ 07978**

Foreign country name: _____ Foreign province/state/county: _____ Foreign postal code: _____

▲ Make sure the SSN(s) above and on line 6c are correct.

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 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

Check only one box.

Exemptions

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

b Spouse

Boxes checked on 6a and 6b **2**

c 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)
KENDRA	KENT	883-00-0002	DAUGHTER	<input type="checkbox"/>
DAVID	THOMAS	884-00-0002	GRANDCHILD	<input checked="" type="checkbox"/>
CARMEN	BRYANT	880-00-0002	SISTER	<input type="checkbox"/>

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

No. of children on 6c who:
• lived with you **3**
• did not live with you due to divorce or separation (see instructions) **0**

Dependents on 6c not entered above **0**

Add numbers on lines above ▶ **5**

d Total number of exemptions claimed

Income

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	41951
8a	Taxable interest. Attach Schedule B if required	8a	5939
b	Tax-exempt interest. Do not include on line 8a	8b	859
9a	Ordinary dividends. Attach Schedule B if required	9a	466
b	Qualified dividends	9b	325
10	Taxable refunds, credits, or offsets of state and local income taxes	10	284
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	2364
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/>	13	-722
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	12593
b	Taxable amount	15b	838
16a	Pensions and annuities	16a	19825
b	Taxable amount	16b	19490
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	650
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	2550
20a	Social security benefits	20a	13682
b	Taxable amount	20b	11630
21	Other income. List type and amount <u>SEE STATEMENT</u>	21	1925
22	Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	87365

Adjusted Gross Income

23	Educator expenses	23	240
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	Health savings account deduction. Attach Form 8889	25	
26	Moving expenses. Attach Form 3903	26	
27	Deductible part of self-employment tax. Attach Schedule SE	27	167
28	Self-employed SEP, SIMPLE, and qualified plans	28	
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	46
31a	Alimony paid b Recipient's SSN ▶ 886-00-0002	31a	3500
32	IRA deduction	32	3000
33	Student loan interest deduction	33	268
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	7221
37	Subtract line 36 from line 22. This is your adjusted gross income ▶	37	80144

**SCHEDULE A
(Form 1040)**

Itemized Deductions

OMB No. 1545-0074

2015
Attachment
Sequence No. **07**

Department of the Treasury
Internal Revenue Service (99)

► **Information about Schedule A and its separate instructions is at www.irs.gov/schedulea.**
► **Attach to Form 1040.**

Name(s) shown on Form 1040

Your social security number

KARL MARX B & KARA BRYANT

881-00-0002

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
Medical and Dental Expenses	Caution: Do not include expenses reimbursed or paid by others.																																			
	1 Medical and dental expenses (see instructions)	1	15597																																	
	2 Enter amount from Form 1040, line 38	2	80144																																	
	3 Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1951, multiply line 2 by 7.5% (.075) instead	3	6011																																	
4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4				9586																															
Taxes You Paid	5 State and local (check only one box):	5	3287																																	
	a <input checked="" type="checkbox"/> Income taxes, or																																			
	b <input type="checkbox"/> General sales taxes																																			
	6 Real estate taxes (see instructions)	6	7380																																	
	7 Personal property taxes	7																																		
	8 Other taxes. List type and amount ►	8																																		
	9 Add lines 5 through 8	9				10667																														
	Interest You Paid	10 Home mortgage interest and points reported to you on Form 1098	10	3164																																
11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ►		11																																		
12 Points not reported to you on Form 1098. See instructions for special rules		12																																		
13 Mortgage insurance premiums (see instructions)		13																																		
14 Investment interest. Attach Form 4952 if required. (See instructions.)		14																																		
15 Add lines 10 through 14		15				3164																														
Gifts to Charity	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions.	16	2125																																	
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	17	350																																	
	18 Carryover from prior year	18																																		
	19 Add lines 16 through 18	19				2475																														
Casualty and Theft Losses	20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)	20																																		
Job Expenses and Certain Miscellaneous Deductions	21 Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►	21																																		
	22 Tax preparation fees	22																																		
	23 Other expenses—investment, safe deposit box, etc. List type and amount ►	23																																		
	24 Add lines 21 through 23	24																																		
	25 Enter amount from Form 1040, line 38	25																																		
	26 Multiply line 25 by 2% (.02)	26																																		
	27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27																																		
Other Miscellaneous Deductions	28 Other—from list in instructions. List type and amount ► GAMBLING LOSSES TO AMOUNT WON 1044	28				1044																														
Total Itemized Deductions	29 Is Form 1040, line 38, over \$154,950? <input checked="" type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	29				26936																														
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here																																			

SCHEDULE B
(Form 1040A or 1040)

Interest and Ordinary Dividends

OMB No. 1545-0074

2015
Attachment
Sequence No. **08**

Department of the Treasury
Internal Revenue Service (99)

▶ **Attach to Form 1040A or 1040.**

▶ **Information about Schedule B and its instructions is at www.irs.gov/scheduleb.**

Name(s) shown on return

Your social security number

KARL MARX B & KARA BRYANT

881-00-0002

Part I
Interest

(See instructions on back and the instructions for Form 1040A, or Form 1040, line 8a.)

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

1	List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see instructions on back and list this interest first. Also, show that buyer's social security number and address ▶ CHARLES CAMPBELL 885-00-0002 123 MAPLE PLUCKEMIN NJ 07978 ACME BANK ACME BROKERAGE ACME PARTNERS	
2	Add the amounts on line 1	5939
3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	
4	Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶	5939

		Amount
		2782
		456
		2578
		123
1		
2		5939
3		
4		5939

Note: If line 4 is over \$1,500, you must complete Part III.

Part II
Ordinary Dividends

(See instructions on back and the instructions for Form 1040A, or Form 1040, line 9a.)

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

5	List name of payer ▶ ACME BROKERAGE ACME PARTNERS	
6	Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶	466

		Amount
		232
		234
5		
6		466

Note: If line 6 is over \$1,500, you must complete Part III.
You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

Part III
Foreign Accounts and Trusts

(See instructions on back.)

7a	At any time during 2015, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions	Yes	No
			X
	If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		
b	If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located ▶		
8	During 2015, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions on back		X

**SCHEDULE C
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

**Profit or Loss From Business
(Sole Proprietorship)**

► **Information about Schedule C and its separate instructions is at www.irs.gov/schedulec.**
► **Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.**

OMB No. 1545-0074

2015
Attachment
Sequence No. **09**

Name of proprietor KARA B BRYANT		Social security number (SSN) 882-00-0002
A Principal business or profession, including product or service (see instructions) DOCUMENT PREPARATION	B Enter code from instructions ► 5 6 1 4 1 0	
C Business name. If no separate business name, leave blank.	D Employer ID number (EIN), (see instr.) 	
E Business address (including suite or room no.) ► City, town or post office, state, and ZIP code		
F Accounting method: (1) <input checked="" type="checkbox"/> Cash (2) <input type="checkbox"/> Accrual (3) <input type="checkbox"/> Other (specify) ►		
G Did you "materially participate" in the operation of this business during 2015? If "No," see instructions for limit on losses . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
H If you started or acquired this business during 2015, check here . . . <input type="checkbox"/>		
I Did you make any payments in 2015 that would require you to file Form(s) 1099? (see instructions) . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
J If "Yes," did you or will you file required Forms 1099? . . . <input type="checkbox"/> Yes <input type="checkbox"/> No		

Part I Income

1 Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked . . . <input type="checkbox"/>	1	2719
2 Returns and allowances . . .	2	
3 Subtract line 2 from line 1 . . .	3	2719
4 Cost of goods sold (from line 42) . . .	4	
5 Gross profit. Subtract line 4 from line 3 . . .	5	2719
6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions) . . .	6	
7 Gross income. Add lines 5 and 6 . . .	7	2719

Part II Expenses. Enter expenses for business use of your home **only** on line 30.

8 Advertising . . .	8		18 Office expense (see instructions)	18	
9 Car and truck expenses (see instructions) . . .	9	242	19 Pension and profit-sharing plans . . .	19	
10 Commissions and fees . . .	10		20 Rent or lease (see instructions):	20	
11 Contract labor (see instructions) . . .	11		a Vehicles, machinery, and equipment	20a	
12 Depletion . . .	12		b Other business property . . .	20b	
13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions) . . .	13		21 Repairs and maintenance . . .	21	
14 Employee benefit programs (other than on line 19) . . .	14		22 Supplies (not included in Part III) . . .	22	
15 Insurance (other than health) . . .	15		23 Taxes and licenses . . .	23	
16 Interest:			24 Travel, meals, and entertainment:	24	
a Mortgage (paid to banks, etc.)	16a		a Travel . . .	24a	
b Other . . .	16b		b Deductible meals and entertainment (see instructions) . . .	24b	
17 Legal and professional services	17		25 Utilities . . .	25	
			26 Wages (less employment credits) . . .	26	
			27a Other expenses (from line 48) . . .	27a	113
			b Reserved for future use . . .	27b	
28 Total expenses before expenses for business use of home. Add lines 8 through 27a . . .	28		28	28	355
29 Tentative profit or (loss). Subtract line 28 from line 7 . . .	29		29	29	2364
30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). Simplified method filers only: enter the total square footage of: (a) your home: _____ and (b) the part of your home used for business: _____. Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30 . . .	30		30	30	
31 Net profit or (loss). Subtract line 30 from line 29. • If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3. • If a loss, you must go to line 32.	31		31	31	2364
32 If you have a loss, check the box that describes your investment in this activity (see instructions). • If you checked 32a, enter the loss on both Form 1040, line 12, (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on Form 1041, line 3. • If you checked 32b, you must attach Form 6198. Your loss may be limited.			32a <input type="checkbox"/> All investment is at risk. 32b <input type="checkbox"/> Some investment is not at risk.		

Part III Cost of Goods Sold (see instructions)

33 Method(s) used to value closing inventory: **a** Cost **b** Lower of cost or market **c** Other (attach explanation)

34 Was there any change in determining quantities, costs, or valuations between opening and closing inventory?
If "Yes," attach explanation Yes No

35 Inventory at beginning of year. If different from last year's closing inventory, attach explanation . . .	35	
36 Purchases less cost of items withdrawn for personal use	36	
37 Cost of labor. Do not include any amounts paid to yourself	37	
38 Materials and supplies	38	
39 Other costs	39	
40 Add lines 35 through 39	40	
41 Inventory at end of year	41	
42 Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4	42	

Part IV Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 9 and are not required to file Form 4562 for this business. See the instructions for line 13 to find out if you must file Form 4562.

43 When did you place your vehicle in service for business purposes? (month, day, year) ▶ 01 / 02 /2011

44 Of the total number of miles you drove your vehicle during 2015, enter the number of miles you used your vehicle for:

a Business 420 **b** Commuting (see instructions) **c** Other 10000

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

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

47a Do you have evidence to support your deduction? Yes No

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

Part V Other Expenses. List below business expenses not included on lines 8–26 or line 30.

PAPER		45
PRINTER CARTRIDGE		68
48 Total other expenses. Enter here and on line 27a	48	113

**SCHEDULE D
(Form 1040)**

Capital Gains and Losses

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service (99)

▶ **Attach to Form 1040 or Form 1040NR.**
▶ **Information about Schedule D and its separate instructions is at www.irs.gov/scheduled.**
▶ **Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.**

2015
Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

KARL MARX B & KARA BRYANT

881-00-0002

Part I Short-Term Capital Gains and Losses—Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b .				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	13700	13600		100
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824 .				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5 123
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				7 223

Part II Long-Term Capital Gains and Losses—Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b .				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	13700	13600		100
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	21051	19965	100	1186
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12 234
13 Capital gain distributions. See the instructions				13 69
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 (2534)
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on the back				15 -945

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-722
	<ul style="list-style-type: none"> • If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22. 		
17	Are lines 15 and 16 both gains? <input type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.		
18	Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions . . . ▶	18	
19	Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions ▶	19	
20	Are lines 18 and 19 both zero or blank? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below. <input type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of: <ul style="list-style-type: none"> • The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500) } 	21	(722)
	Note: When figuring which amount is smaller, treat both amounts as positive numbers.		
22	Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b? <input checked="" type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). <input type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.		

Sales and Other Dispositions of Capital Assets

Department of the Treasury
Internal Revenue Service

► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.
► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

2015
Attachment
Sequence No. **12A**

Name(s) shown on return

KARL MARX B & KARA BRYANT

Social security number or taxpayer identification number

881-00-0002

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part I Short-Term. Transactions involving capital assets you held 1 year or less are short term. For long-term transactions, see page 2.

Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (A)** Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- (B)** Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
- (C)** Short-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	ACME BROKERAGE	VARIOUS	12/31/2015	13700	13600			100
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				13700	13600			100

Note: If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on other side
 KARL MARX B & KARA BRYANT

Social security number or taxpayer identification number
 881-00-0002

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (D)** Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)
- (E)** Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS
- (F)** Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	ACME BROKERAGE	VARIOUS	12/31/2015	13700	13600			100
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶				13700	13600			100

Note: If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

**SCHEDULE E
(Form 1040)**

Supplemental Income and Loss

OMB No. 1545-0074

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

2015
Attachment
Sequence No. **13**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040NR, or Form 1041.

▶ Information about Schedule E and its separate instructions is at www.irs.gov/schedulee.

Name(s) shown on return

Your social security number

KARL MARX B & KARA BRYANT

881-00-0002

Part I Income or Loss From Rental Real Estate and Royalties Note: If you are in the business of renting personal property, use Schedule C or C-EZ (see instructions). If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

A Did you make any payments in 2015 that would require you to file Form(s) 1099? (see instructions) Yes No

B If "Yes," did you or will you file required Forms 1099? Yes No

1a	Physical address of each property (street, city, state, ZIP code)	
A	123 MAIN PLUCKEMIN NJ 07978	5002
B		0
C		0

1b	Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
A	6				<input type="checkbox"/>
B					<input type="checkbox"/>
C					<input type="checkbox"/>

Type of Property:

- 1 Single Family Residence 3 Vacation/Short-Term Rental 5 Land 7 Self-Rental
- 2 Multi-Family Residence 4 Commercial 6 Royalties 8 Other (describe)

Income:	Properties:	A	B	C
3 Rents received	3			
4 Royalties received	4	650		

Expenses:

5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions.	8			
9 Insurance	9			
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest.	13			
14 Repairs.	14			
15 Supplies	15			
16 Taxes	16			
17 Utilities.	17			
18 Depreciation expense or depletion	18			
19 Other (list) ▶	19			
20 Total expenses. Add lines 5 through 19	20			

21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	650		
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	()	()	()

23a Total of all amounts reported on line 3 for all rental properties	23a		
b Total of all amounts reported on line 4 for all royalty properties	23b	650	
c Total of all amounts reported on line 12 for all properties	23c		
d Total of all amounts reported on line 18 for all properties	23d		
e Total of all amounts reported on line 20 for all properties	23e		

24 Income. Add positive amounts shown on line 21. Do not include any losses	24	650
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25	()

26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2 NPA=650	26	650
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For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2015

Name of person with **self-employment** income (as shown on Form 1040 or Form 1040NR)

KARA B BRYANT

Social security number of person with **self-employment** income ▶

882-00-0002

Section B—Long Schedule SE

Part I Self-Employment Tax

Note. If your only income subject to self-employment tax is **church employee income**, see instructions. Also see instructions for the definition of church employee income.

A If you are a minister, member of a religious order, or Christian Science practitioner **and** you filed Form 4361, but you had \$400 or more of **other** net earnings from self-employment, check here and continue with Part I

1a	Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. Note. Skip lines 1a and 1b if you use the farm optional method (see instructions)		
b	If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Z	()
2	Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report. Note. Skip this line if you use the nonfarm optional method (see instructions)		2364
3	Combine lines 1a, 1b, and 2		2364
4a	If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3 Note. If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.		2183
b	If you elect one or both of the optional methods, enter the total of lines 15 and 17 here		
c	Combine lines 4a and 4b. If less than \$400, stop ; you do not owe self-employment tax. Exception. If less than \$400 and you had church employee income , enter -0- and continue ▶		2183
5a	Enter your church employee income from Form W-2. See instructions for definition of church employee income	5a	
b	Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-	5b	
6	Add lines 4c and 5b	6	2183
7	Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2015	7	118,500 00
8a	Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$118,500 or more, skip lines 8b through 10, and go to line 11	8a	13817
b	Unreported tips subject to social security tax (from Form 4137, line 10)	8b	
c	Wages subject to social security tax (from Form 8919, line 10)	8c	
d	Add lines 8a, 8b, and 8c	8d	13817
9	Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 ▶	9	104683
10	Multiply the smaller of line 6 or line 9 by 12.4% (.124)	10	271
11	Multiply line 6 by 2.9% (.029)	11	63
12	Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 57, or Form 1040NR, line 55	12	334
13	Deduction for one-half of self-employment tax. Multiply line 12 by 50% (.50). Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27	13	167

Part II Optional Methods To Figure Net Earnings (see instructions)

Farm Optional Method. You may use this method **only** if (a) your gross farm income¹ was not more than \$7,320, or (b) your net farm profits² were less than \$5,284.

14	Maximum income for optional methods	14	4,880 00
15	Enter the smaller of: two-thirds (2/3) of gross farm income ¹ (not less than zero) or \$4,880. Also include this amount on line 4b above	15	

Nonfarm Optional Method. You may use this method **only** if (a) your net nonfarm profits³ were less than \$5,284 and also less than 72.189% of your gross nonfarm income,⁴ and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. **Caution.** You may use this method no more than five times.

16	Subtract line 15 from line 14	16	
17	Enter the smaller of: two-thirds (2/3) of gross nonfarm income ⁴ (not less than zero) or the amount on line 16. Also include this amount on line 4b above	17	

¹ From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.

² From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A—minus the amount you would have entered on line 1b had you not used the optional method.

³ From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.

⁴ From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

Child and Dependent Care Expenses



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

▶ Information about Form 2441 and its separate instructions is at www.irs.gov/form2441.

Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on return

KARL MARX B & KARA BRYANT

Your social security number

881-00-0002

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 (number, street, apt. no., city, state, and ZIP code)	(c) Identifying number (SSN or EIN)	(d) Amount paid (see instructions)
ACME DAY CARE	123 MAIN PLUCKEMIN NJ 07978	93-9009999	1100

Did you receive dependent care benefits? **No** → Complete only Part II below.
Yes → Complete Part III on the back next.

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 60a, or Form 1040NR, line 59a.

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 2015 for the person listed in column (a)
First	Last		
DAVID	THOMAS	884-00-0002	1100

3 Add the amounts in column (c) of line 2. Do not 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	3	1100																																																									
4 Enter your earned income . See instructions	4	28134																																																									
5 If married filing jointly, enter your spouse's earned income (if you or your spouse was a student or was disabled, see the instructions); all others , enter the amount from line 4	5	16014																																																									
6 Enter the smallest of line 3, 4, or 5	6	1100																																																									
7 Enter the amount from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37	7	80144																																																									
8 Enter on line 8 the decimal amount shown below that applies to the amount on line 7	8	X .20																																																									
<table border="0"> <tr> <td>If line 7 is:</td> <td>If line 7 is:</td> </tr> <tr> <td> <table border="0"> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> <tr> <td>\$0—15,000</td> <td></td> <td>.35</td> </tr> <tr> <td>15,000—17,000</td> <td></td> <td>.34</td> </tr> <tr> <td>17,000—19,000</td> <td></td> <td>.33</td> </tr> <tr> <td>19,000—21,000</td> <td></td> <td>.32</td> </tr> <tr> <td>21,000—23,000</td> <td></td> <td>.31</td> </tr> <tr> <td>23,000—25,000</td> <td></td> <td>.30</td> </tr> <tr> <td>25,000—27,000</td> <td></td> <td>.29</td> </tr> <tr> <td>27,000—29,000</td> <td></td> <td>.28</td> </tr> </table> </td> <td> <table border="0"> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> <tr> <td>\$29,000—31,000</td> <td></td> <td>.27</td> </tr> <tr> <td>31,000—33,000</td> <td></td> <td>.26</td> </tr> <tr> <td>33,000—35,000</td> <td></td> <td>.25</td> </tr> <tr> <td>35,000—37,000</td> <td></td> <td>.24</td> </tr> <tr> <td>37,000—39,000</td> <td></td> <td>.23</td> </tr> <tr> <td>39,000—41,000</td> <td></td> <td>.22</td> </tr> <tr> <td>41,000—43,000</td> <td></td> <td>.21</td> </tr> <tr> <td>43,000—No limit</td> <td></td> <td>.20</td> </tr> </table> </td> </tr> </table>	If line 7 is:	If line 7 is:	<table border="0"> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> <tr> <td>\$0—15,000</td> <td></td> <td>.35</td> </tr> <tr> <td>15,000—17,000</td> <td></td> <td>.34</td> </tr> <tr> <td>17,000—19,000</td> <td></td> <td>.33</td> </tr> <tr> <td>19,000—21,000</td> <td></td> <td>.32</td> </tr> <tr> <td>21,000—23,000</td> <td></td> <td>.31</td> </tr> <tr> <td>23,000—25,000</td> <td></td> <td>.30</td> </tr> <tr> <td>25,000—27,000</td> <td></td> <td>.29</td> </tr> <tr> <td>27,000—29,000</td> <td></td> <td>.28</td> </tr> </table>	Over	But not over	Decimal amount is	\$0—15,000		.35	15,000—17,000		.34	17,000—19,000		.33	19,000—21,000		.32	21,000—23,000		.31	23,000—25,000		.30	25,000—27,000		.29	27,000—29,000		.28	<table border="0"> <tr> <th>Over</th> <th>But not over</th> <th>Decimal amount is</th> </tr> <tr> <td>\$29,000—31,000</td> <td></td> <td>.27</td> </tr> <tr> <td>31,000—33,000</td> <td></td> <td>.26</td> </tr> <tr> <td>33,000—35,000</td> <td></td> <td>.25</td> </tr> <tr> <td>35,000—37,000</td> <td></td> <td>.24</td> </tr> <tr> <td>37,000—39,000</td> <td></td> <td>.23</td> </tr> <tr> <td>39,000—41,000</td> <td></td> <td>.22</td> </tr> <tr> <td>41,000—43,000</td> <td></td> <td>.21</td> </tr> <tr> <td>43,000—No limit</td> <td></td> <td>.20</td> </tr> </table>	Over	But not over	Decimal amount is	\$29,000—31,000		.27	31,000—33,000		.26	33,000—35,000		.25	35,000—37,000		.24	37,000—39,000		.23	39,000—41,000		.22	41,000—43,000		.21	43,000—No limit		.20	
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9 Multiply line 6 by the decimal amount on line 8. If you paid 2014 expenses in 2015, see the instructions	9	220																																																									
10 Tax liability limit. Enter the amount from the Credit Limit Worksheet in the instructions.	10	4005																																																									
11 Credit for child and dependent care expenses. Enter the smaller of line 9 or line 10 here and on Form 1040, line 49; Form 1040A, line 31; or Form 1040NR, line 47	11	220																																																									

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

**Education Credits
(American Opportunity and Lifetime Learning Credits)**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1040A.

▶ Information about Form 8863 and its separate instructions is at www.irs.gov/form8863.

2015
Attachment
Sequence No. **50**

Name(s) shown on return

Your social security number

KARL MARX B & KARA BRYANT

881-00-0002



Complete a separate Part III on page 2 for each student for whom you are claiming either credit before you complete Parts I and II.

Part I Refundable American Opportunity Credit

1	After completing Part III for each student, enter the total of all amounts from all Parts III, line 30	1	2350
2	Enter: \$180,000 if married filing jointly; \$90,000 if single, head of household, or qualifying widow(er)	2	180000
3	Enter the amount from Form 1040, line 38, or Form 1040A, line 22. If you are filing Form 2555, 2555-EZ, or 4563, or you are excluding income from Puerto Rico, see Pub. 970 for the amount to enter	3	80144
4	Subtract line 3 from line 2. If zero or less, stop ; you cannot take any education credit	4	99856
5	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	5	20000
6	If line 4 is: • Equal to or more than line 5, enter 1.000 on line 6 • Less than line 5, divide line 4 by line 5. Enter the result as a decimal (rounded to at least three places)	6	1.000
7	Multiply line 1 by line 6. Caution: If you were under age 24 at the end of the year and meet the conditions described in the instructions, you cannot take the refundable American opportunity credit; skip line 8, enter the amount from line 7 on line 9, and check this box <input type="checkbox"/>	7	2350
8	Refundable American opportunity credit. Multiply line 7 by 40% (.40). Enter the amount here and on Form 1040, line 68, or Form 1040A, line 44. Then go to line 9 below.	8	940

Part II Nonrefundable Education Credits

9	Subtract line 8 from line 7. Enter here and on line 2 of the Credit Limit Worksheet (see instructions)	9	1410
10	After completing Part III for each student, enter the total of all amounts from all Parts III, line 31. If zero, skip lines 11 through 17, enter -0- on line 18, and go to line 19	10	1000
11	Enter the smaller of line 10 or \$10,000	11	1000
12	Multiply line 11 by 20% (.20)	12	200
13	Enter: \$130,000 if married filing jointly; \$65,000 if single, head of household, or qualifying widow(er)	13	130000
14	Enter the amount from Form 1040, line 38, or Form 1040A, line 22. If you are filing Form 2555, 2555-EZ, or 4563, or you are excluding income from Puerto Rico, see Pub. 970 for the amount to enter	14	80144
15	Subtract line 14 from line 13. If zero or less, skip lines 16 and 17, enter -0- on line 18, and go to line 19	15	49856
16	Enter: \$20,000 if married filing jointly; \$10,000 if single, head of household, or qualifying widow(er)	16	20000
17	If line 15 is: • Equal to or more than line 16, enter 1.000 on line 17 and go to line 18 • Less than line 16, divide line 15 by line 16. Enter the result as a decimal (rounded to at least three places)	17	1.000
18	Multiply line 12 by line 17. Enter here and on line 1 of the Credit Limit Worksheet (see instructions) ▶	18	200
19	Nonrefundable education credits. Enter the amount from line 7 of the Credit Limit Worksheet (see instructions) here and on Form 1040, line 50, or Form 1040A, line 33	19	1610

Name(s) shown on return KARL MARX B & KARA BRYANT	Your social security number 881-00-0002
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Complete Part III for each student for whom you are claiming either the American opportunity credit or lifetime learning credit. Use additional copies of page 2 as needed for each student.

Part III Student and Educational Institution Information
See instructions.

<p>20 Student name (as shown on page 1 of your tax return) KENDRA KENT</p>	<p>21 Student social security number (as shown on page 1 of your tax return) 883-00-0002</p>		
<p>22 Educational institution information (see instructions)</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; vertical-align: top;"> <p>a. Name of first educational institution ACME COLLEGE</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions. 123 MAIN PLUCKEMIN NJ 07978</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T). 91-4009999</p> </td> <td style="width:50%; vertical-align: top;"> <p>b. Name of second educational institution (if any)</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T). -</p> </td> </tr> </table>		<p>a. Name of first educational institution ACME COLLEGE</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions. 123 MAIN PLUCKEMIN NJ 07978</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T). 91-4009999</p>	<p>b. Name of second educational institution (if any)</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T). -</p>
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<p>23 Has the Hope Scholarship Credit or American opportunity credit been claimed for this student for any 4 tax years before 2015? <input type="checkbox"/> Yes — Stop! Go to line 31 for this student. <input checked="" type="checkbox"/> No — Go to line 24.</p>			
<p>24 Was the student enrolled at least half-time for at least one academic period that began or is treated as having begun in 2015 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? (see instructions) <input checked="" type="checkbox"/> Yes — Go to line 25. <input type="checkbox"/> No — Stop! Go to line 31 for this student.</p>			
<p>25 Did the student complete the first 4 years of postsecondary education before 2015 (see instructions)? <input type="checkbox"/> Yes — Stop! Go to line 31 for this student. <input checked="" type="checkbox"/> No — Go to line 26.</p>			
<p>26 Was the student convicted, before the end of 2015, of a felony for possession or distribution of a controlled substance? <input type="checkbox"/> Yes — Stop! Go to line 31 for this student. <input checked="" type="checkbox"/> No — Complete lines 27 through 30 for this student.</p>			



You cannot take the American opportunity credit and the lifetime learning credit for the same student in the same year. If you complete lines 27 through 30 for this student, do not complete line 31.

American Opportunity Credit

27 Adjusted qualified education expenses (see instructions). Do not enter more than \$4,000	27	3400
28 Subtract \$2,000 from line 27. If zero or less, enter -0-	28	1400
29 Multiply line 28 by 25% (.25)	29	350
30 If line 28 is zero, enter the amount from line 27. Otherwise, add \$2,000 to the amount on line 29 and enter the result. Skip line 31. Include the total of all amounts from all Parts III, line 30, on Part I, line 1	30	2350

Lifetime Learning Credit

31 Adjusted qualified education expenses (see instructions). Include the total of all amounts from all Parts III, line 31, on Part II, line 10	31	
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Name(s) shown on return KARL MARX B & KARA BRYANT	Your social security number 881-00-0002
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Complete Part III for each student for whom you are claiming either the American opportunity credit or lifetime learning credit. Use additional copies of page 2 as needed for each student.

Part III Student and Educational Institution Information
See instructions.

<p>20 Student name (as shown on page 1 of your tax return)</p> <p>KARA BRYANT</p>	<p>21 Student social security number (as shown on page 1 of your tax return)</p> <p>882-00-0002</p>
<p>22 Educational institution information (see instructions)</p>	
<p>a. Name of first educational institution</p> <p>ACME COLLEGE</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p>123 MAIN PLUCKEMIN NJ 07978</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T).</p> <p>91-4009999</p>	<p>b. Name of second educational institution (if any)</p> <p>(1) Address. Number and street (or P.O. box). City, town or post office, state, and ZIP code. If a foreign address, see instructions.</p> <p>(2) Did the student receive Form 1098-T from this institution for 2015? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>(3) Did the student receive Form 1098-T from this institution for 2014 with Box 2 filled in and Box 7 checked? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you checked "No" in both (2) and (3), skip (4).</p> <p>(4) If you checked "Yes" in (2) or (3), enter the institution's federal identification number (from Form 1098-T).</p> <p style="text-align: center;">-</p>
<p>23 Has the Hope Scholarship Credit or American opportunity credit been claimed for this student for any 4 tax years before 2015? <input type="checkbox"/> Yes — Stop! Go to line 31 for this student. <input checked="" type="checkbox"/> No — Go to line 24.</p>	
<p>24 Was the student enrolled at least half-time for at least one academic period that began or is treated as having begun in 2015 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? (see instructions) <input type="checkbox"/> Yes — Go to line 25. <input checked="" type="checkbox"/> No — Stop! Go to line 31 for this student.</p>	
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<p>26 Was the student convicted, before the end of 2015, of a felony for possession or distribution of a controlled substance? <input type="checkbox"/> Yes — Stop! Go to line 31 for this student. <input type="checkbox"/> No — Complete lines 27 through 30 for this student.</p>	



You cannot take the American opportunity credit and the lifetime learning credit for the same student in the same year. If you complete lines 27 through 30 for this student, do not complete line 31.

American Opportunity Credit

27 Adjusted qualified education expenses (see instructions). Do not enter more than \$4,000	27
28 Subtract \$2,000 from line 27. If zero or less, enter -0-	28
29 Multiply line 28 by 25% (.25)	29
30 If line 28 is zero, enter the amount from line 27. Otherwise, add \$2,000 to the amount on line 29 and enter the result. Skip line 31. Include the total of all amounts from all Parts III, line 30, on Part I, line 1	30

Lifetime Learning Credit

31 Adjusted qualified education expenses (see instructions). Include the total of all amounts from all Parts III, line 31, on Part II, line 10	31	1000
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Premium Tax Credit (PTC)

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, or 1040NR.
▶ Information about Form 8962 and its separate instructions is at www.irs.gov/form8962.

Name shown on your return

Your social security number

KARL R MARX B

881-00-0002

You cannot claim the PTC if your filing status is married filing separately unless you are eligible for an exception (see instructions). If you qualify, check the box.

Part I Annual and Monthly Contribution Amount

1	Tax family size. Enter the number of exemptions from Form 1040 or Form 1040A, line 6d, or Form 1040NR, line 7d	1	5
2a	Modified AGI. Enter your modified AGI (see instructions)	2a	83055
b	Enter the total of your dependents' modified AGI (see instructions)	2b	
3	Household income. Add the amounts on lines 2a and 2b	3	83055
4	Federal poverty line. Enter the federal poverty line amount from Table 1-1, 1-2, or 1-3 (see instructions). Check the appropriate box for the federal poverty table used. a <input type="checkbox"/> Alaska b <input type="checkbox"/> Hawaii c <input checked="" type="checkbox"/> Other 48 states and DC	4	27910
5	Household income as a percentage of federal poverty line (see instructions)	5	297%
6	Did you enter 401% on line 5? (See instructions if you entered less than 100%). <input checked="" type="checkbox"/> No. Continue to line 7. <input type="checkbox"/> Yes. You are not eligible to receive PTC. If advance payment of the PTC was made, see the instructions for how to report your excess advance PTC repayment amount.		
7	Applicable Figure. Using your line 5 percentage, locate your "applicable figure" on the table in the instructions	7	0.0947
8a	Annual contribution amount. Multiply line 3 by line 7	8a	7865
b	Monthly contribution amount. Divide line 8a by 12. Round to whole dollar amount	8b	655

Part II Premium Tax Credit Claim and Reconciliation of Advance Payment of Premium Tax Credit

- 9** Are you allocating policy amounts with another taxpayer or do you want to use the alternative calculation for year of marriage (see instructions)?
 Yes. Skip to Part IV, Shared Policy Allocation, or Part V, Alternative Calculation for Year of Marriage. **No.** Continue to line 10.
- 10** See the instructions to determine if you can use line 11 or must complete lines 12 through 23.
 Yes. Continue to line 11. Compute your annual PTC. Then skip lines 12–23 and continue to line 24.
 No. Continue to lines 12–23. Compute your monthly PTC and continue to line 24.

Annual Calculation	(a) Annual enrollment premiums (Form(s) 1095-A, line 33A)	(b) Annual applicable SLCSP premium (Form(s) 1095-A, line 33B)	(c) Annual contribution amount (line 8a)	(d) Annual maximum premium assistance (subtract (c) from (b), if zero or less, enter -0-)	(e) Annual premium tax credit allowed (smaller of (a) or (d))	(f) Annual advance payment of PTC (Form (s) 1095-A, line 33C)
11 Annual Totals						
Monthly Calculation	(a) Monthly enrollment premiums (Form(s) 1095-A, lines 21–32, column A)	(b) Monthly applicable SLCSP premium (Form (s) 1095-A, lines 21–32, column B)	(c) Monthly contribution amount (amount from line 8b or alternative marriage monthly contribution)	(d) Monthly maximum premium assistance (subtract (c) from (b), if zero or less, enter -0-)	(e) Monthly premium tax credit allowed (smaller of (a) or (d))	(f) Monthly advance payment of PTC (Form(s) 1095-A, lines 21–32, column C)
12 January	600	720	655	65	65	50
13 February	600	720	655	65	65	50
14 March	600	720	655	65	65	50
15 April	600	720	655	65	65	50
16 May	600	720	655	65	65	50
17 June	600	720	655	65	65	50
18 July						
19 August						
20 September						
21 October						
22 November						
23 December						

24	Total premium tax credit. Enter the amount from line 11(e) or add lines 12(e) through 23(e) and enter the total here	24	390
25	Advance payment of PTC. Enter the amount from line 11(f) or add lines 12(f) through 23(f) and enter the total here	25	300
26	Net premium tax credit. If line 24 is greater than line 25, subtract line 25 from line 24. Enter the difference here and on Form 1040, line 69; Form 1040A, line 45; or Form 1040NR, line 65. If you elected the alternative calculation for marriage, enter zero. If line 24 equals line 25, enter zero. Stop here. If line 25 is greater than line 24, leave this line blank and continue to line 27	26	90

Part III Repayment of Excess Advance Payment of the Premium Tax Credit

27	Excess advance payment of PTC. If line 25 is greater than line 24, subtract line 24 from line 25. Enter the difference here	27	
28	Repayment limitation (see instructions)	28	
29	Excess advance premium tax credit repayment. Enter the smaller of line 27 or line 28 here and on Form 1040, line 46; Form 1040A, line 29; or Form 1040NR, line 44	29	

Health Coverage Exemptions

▶ Attach to Form 1040, Form 1040A, or Form 1040EZ.

▶ Information about Form 8965 and its separate instructions is at www.irs.gov/form8965.

Name as shown on return

KARL R MARX B

Your social security number

881-00-0002

Complete this form if you have a Marketplace-granted coverage exemption or you are claiming a coverage exemption on your return.

Part I Marketplace-Granted Coverage Exemptions for Individuals. If you and/or a member of your tax household have an exemption granted by the Marketplace, complete Part I.

	(a) Name of Individual	(b) SSN	(c) Exemption Certificate Number
1			
2			
3			
4			
5			
6			

Part II Coverage Exemptions Claimed on Your Return for Your Household

7a Are you claiming an exemption because your household income is below the filing threshold? Yes No

b Are you claiming a hardship exemption because your gross income is below the filing threshold? Yes No

Part III Coverage Exemptions Claimed on Your Return for Individuals. If you and/or a member of your tax household are claiming an exemption on your return, complete Part III.

	(a) Name of Individual	(b) SSN	(c) Exemption Type	(d) Full Year	(e) Jan	(f) Feb	(g) Mar	(h) Apr	(i) May	(j) June	(k) July	(l) Aug	(m) Sept	(n) Oct	(o) Nov	(p) Dec
8	KENDRA KENT	883-00-0002	B								X	X				
9	DAVID THOMAS	884-00-0002	B								X	X				
10																
11																
12																
13																

Residential Energy Credits

▶ Information about Form 5695 and its separate instructions is at www.irs.gov/form5695.
 ▶ Attach to Form 1040 or Form 1040NR.

Name(s) shown on return: **KARL MARX B & KARA BRYANT** Your social security number: **881-00-0002**

Part I Residential Energy Efficient Property Credit (See instructions before completing this part.)

Note: Skip lines 1 through 11 if you only have a **credit carryforward from 2014**.

1 Qualified solar electric property costs	1	
2 Qualified solar water heating property costs	2	
3 Qualified small wind energy property costs	3	
4 Qualified geothermal heat pump property costs	4	
5 Add lines 1 through 4	5	
6 Multiply line 5 by 30% (0.30)	6	
7a Qualified fuel cell property. Was qualified fuel cell property installed on or in connection with your main home located in the United States? (See instructions) ▶	7a	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Caution: If you checked the "No" box, you cannot take a credit for qualified fuel cell property. Skip lines 7b through 11.		
b Print the complete address of the main home where you installed the fuel cell property.		
_____ Number and street	_____ Unit No.	
_____ City, State, and ZIP code		
8 Qualified fuel cell property costs	8	
9 Multiply line 8 by 30% (0.30)	9	
10 Kilowatt capacity of property on line 8 above ▶ _____ x \$1,000	10	
11 Enter the smaller of line 9 or line 10	11	
12 Credit carryforward from 2014. Enter the amount, if any, from your 2014 Form 5695, line 16	12	
13 Add lines 6, 11, and 12	13	
14 Limitation based on tax liability. Enter the amount from the Residential Energy Efficient Property Credit Limit Worksheet (see instructions)	14	1980
15 Residential energy efficient property credit. Enter the smaller of line 13 or line 14. Also include this amount on Form 1040, line 53; or Form 1040NR, line 50	15	
16 Credit carryforward to 2016. If line 15 is less than line 13, subtract line 15 from line 13	16	

Part II Nonbusiness Energy Property Credit

<p>17a Were the qualified energy efficiency improvements or residential energy property costs for your main home located in the United States? (see instructions) ▶</p> <p>Caution: If you checked the "No" box, you cannot claim the nonbusiness energy property credit. Do not complete Part II.</p> <p>b Print the complete address of the main home where you made the qualifying improvements. Caution: You can only have one main home at a time.</p> <p style="margin-left: 40px;">123 RLM Number and street Unit No.</p> <p style="margin-left: 40px;">PLUCKEMIN NJ 07978 City, State, and ZIP code</p>	<p>17a <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>		
<p>c Were any of these improvements related to the construction of this main home? ▶</p> <p>Caution: If you checked the "Yes" box, you can only claim the nonbusiness energy property credit for qualifying improvements that were not related to the construction of the home. Do not include expenses related to the construction of your main home, even if the improvements were made after you moved into the home.</p>	<p>17c <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>		
<p>18 Lifetime limitation. Enter the amount from the Lifetime Limitation Worksheet (see instructions)</p>	<p>18 305</p>		
<p>19 Qualified energy efficiency improvements (original use must begin with you and the component must reasonably be expected to last for at least 5 years; do not include labor costs) (see instructions).</p>			
<p>a Insulation material or system specifically and primarily designed to reduce heat loss or gain of your home that meets the prescriptive criteria established by the 2009 IECC</p>	<p>19a 175</p>		
<p>b Exterior doors that meet or exceed the Energy Star program requirements</p>	<p>19b</p>		
<p>c Metal or asphalt roof that meets or exceeds the Energy Star program requirements and has appropriate pigmented coatings or cooling granules which are specifically and primarily designed to reduce the heat gain of your home</p>	<p>19c</p>		
<p>d Exterior windows and skylights that meet or exceed the Energy Star program requirements</p>	<table border="1"> <tr> <td>19d</td> <td>7450</td> </tr> </table>	19d	7450
19d	7450		
<p>e Maximum amount of cost on which the credit can be figured</p>	<table border="1"> <tr> <td>19e</td> <td>\$2,000</td> </tr> </table>	19e	\$2,000
19e	\$2,000		
<p>f If you claimed window expenses on your Form 5695 for 2006, 2007, 2009, 2010, 2011, 2012, 2013, or 2014, enter the amount from the Window Expense Worksheet (see instructions); otherwise enter -0-</p>	<table border="1"> <tr> <td>19f</td> <td></td> </tr> </table>	19f	
19f			
<p>g Subtract line 19f from line 19e. If zero or less, enter -0-</p>	<table border="1"> <tr> <td>19g</td> <td>2000</td> </tr> </table>	19g	2000
19g	2000		
<p>h Enter the smaller of line 19d or line 19g</p>	<p>19h 2000</p>		
<p>20 Add lines 19a, 19b, 19c, and 19h</p>	<p>20 2175</p>		
<p>21 Multiply line 20 by 10% (0.10)</p>	<p>21 218</p>		
<p>22 Residential energy property costs (must be placed in service by you; include labor costs for onsite preparation, assembly, and original installation) (see instructions).</p>			
<p>a Energy-efficient building property. Do not enter more than \$300</p>	<p>22a</p>		
<p>b Qualified natural gas, propane, or oil furnace or hot water boiler. Do not enter more than \$150</p>	<p>22b</p>		
<p>c Advanced main air circulating fan used in a natural gas, propane, or oil furnace. Do not enter more than \$50</p>	<p>22c</p>		
<p>23 Add lines 22a through 22c</p>	<p>23</p>		
<p>24 Add lines 21 and 23</p>	<p>24 218</p>		
<p>25 Maximum credit amount. (If you jointly occupied the home, see instructions)</p>	<p>25 \$500</p>		
<p>26 Enter the amount, if any, from line 18</p>	<p>26 305</p>		
<p>27 Subtract line 26 from line 25. If zero or less, stop; you cannot take the nonbusiness energy property credit</p>	<p>27 195</p>		
<p>28 Enter the smaller of line 24 or line 27</p>	<p>28 195</p>		
<p>29 Limitation based on tax liability. Enter the amount from the Nonbusiness Energy Property Credit Limit Worksheet (see instructions)</p>	<p>29 2175</p>		
<p>30 Nonbusiness energy property credit. Enter the smaller of line 28 or line 29. Also include this amount on Form 1040, line 53; or Form 1040NR, line 50</p>	<p>30 195</p>		

<u>Description of Income</u>	<u>Amount</u>
GAMBLING WINNINGS	1300
FORM 1099-C	625
<hr/>	<hr/>
TOTALS	1925

Child Tax Credit Worksheet

Before you begin: ✓ Figure the amount of any credits you are claiming on Form 5695, Part II, line 30; Form 8910; Form 8936; or Schedule R.



- To be a qualifying child for the child tax credit, the child must be **under age 17** at the end of 2015 and meet the other requirements listed earlier under Qualifying Child. Also see Taxpayer identification number needed by due date of return, earlier.
- If you do not have a qualifying child, you cannot claim the child tax credit.

Part 1

1. Number of qualifying children: 1 × \$1,000. Enter the result.

1	1000
---	------

2. Enter the amount from Form 1040, line 38; Form 1040A, line 22; or Form 1040NR, line 37.

2	80144
---	-------

3. **1040 Filers.** Enter the total of any—
 • Exclusion of income from Puerto Rico, and
 • Amounts from Form 2555, lines 45 and 50; Form 2555-EZ, line 18; and Form 4563, line 15.
1040A and 1040NR Filers. Enter -0-.

3	
---	--

4. Add lines 2 and 3. Enter the total.

4	80144
---	-------

5. Enter the amount shown below for your filing status.
 • Married filing jointly - \$110,000
 • Single, head of household, or qualifying widow(er) - \$75,000
 • Married filing separately - \$55,000

5	110000
---	--------

6. Is the amount on line 4 more than the amount on line 5?
 No. Leave line 6 blank. Enter -0- on line 7.
 Yes. Subtract line 5 from line 4.
 If the result is not a multiple of \$1,000, increase it to the next multiple of \$1,000. For example, increase \$425 to \$1,000, increase \$1,025 to \$2,000, etc.

6	
---	--

7. Multiply the amount on line 6 by 5% (0.05). Enter the result.

7	0
---	---

8. Is the amount on line 1 more than the amount on line 7?
 No.
 You cannot take the child tax credit on Form 1040, line 52; Form 1040A, line 35; or Form 1040NR, line 49. You also cannot take the additional child tax credit on Form 1040, line 67; Form 1040A, line 43; or Form 1040NR, line 64. Complete the rest of your Form 1040, Form 1040A, or Form 1040NR.
 Yes. Subtract line 7 from line 1. Enter the result.

8	1000
---	------

Go to Part 2 on the next page.

QNA

Child Tax Credit Worksheet—Continued

Part 2

9. Enter the amount from Form 1040, line 47; Form 1040A, line 30; or Form 1040NR, line 45. 9 4009

10. Add the following amounts from:

Form 1040 or Form 1040A or Form 1040NR

Line 48	Line 46	+ _____ 4
Line 49	Line 31	+ _____ 220
Line 50	Line 33	+ _____ 1610
Line 51	Line 34	+ _____
Form 5695 , line 30		+ _____ 195
Form 8910 , line 15		+ _____
Form 8936 , line 23		+ _____
Schedule R , line 22		+ _____

Enter the total. 10 2029

11. Are you claiming any of the following credits?

- Mortgage interest credit, Form 8396.
- Adoption credit, Form 8839.
- Residential energy efficient property credit, Form 5695, Part I.
- District of Columbia first-time homebuyer credit, Form 8859.

No. Enter the amount from line 10.

Yes. If you are filing Form 2555 or 2555-EZ, enter the amount from line 10. Otherwise, complete the Line 11 Worksheet, later, to figure the amount to enter here.

11 2029

12. Subtract line 11 from line 9. Enter the result.

12 1980

13. Is the amount on line 8 of this worksheet more than the amount on line 12?

No. Enter the amount from line 8.

Yes. Enter the amount from line 12. See the **TIP** below.

This is your child tax credit.

13 1000

Enter this amount on
Form 1040, line 52;
Form 1040A, line 35;
or Form 1040NR, line 49.



You may be able to take the **additional child tax credit** on Form 1040, line 67; Form 1040A, line 43; or Form 1040NR, line 64, only if you answered “Yes” on line 13.

- First, complete your Form 1040 through line 66a (also complete line 71), Form 1040A through line 42a, or Form 1040NR through line 63 (also complete line 67).
- Then, use Parts II–IV of Schedule 8812 to figure any additional child tax credit.

Medical and Dental Expenses

<u>Description of Expense</u>	<u>Amount</u>
Medical and Dental Insurance	5195
Amount Paid to Doctors, Dentists, Eye Doctors, etc.	1653
Prescription Medicine, Drugs, or Insulin	965
Hospital Care including Meals and Lodging	3200
Medical Aids (Crutches, Hearing Aids, Wheelchairs, etc.)	500
Qualified Long-Term Care Insurance	3800
Mileage (1236 miles x 0.230)	<u>284</u>
TOTALS:	15597

SCHEDULE A CONTRIBUTION LIMITATION WORKSHEET

Keep for your records

SUMMARY

	(a) Current Year Contributions 2015	(b) Contributions carried from prior year	(c) Total	(d) Current Year Deduction	(e) Carryover Deduction
1 50% Limitation	2475		2475	2475	
2 30% Capital Gain					
3 30% Limitation					
4 20% Limitation					
5 TOTALS	2475		2475	2475	

LIMITATION CALCULATIONS

6 2015 Adjusted Gross Income (AGI) **6** 80144

50% Contributions

	Limitation	2015 Deduction & Carryover to 2016
7 Total 50% Contributions (line 1, column c) 7	2475	
8 50% of AGI limitation (line 6 x .50) 8	40072	
9 2015 deduction (lesser of line 7 or line 8) (carries to line 1, column d) 9		2475
10 Carryover to 2016, if any (line 7 less line 9) (carries to line 1, column e) 10		

30% Capital Gain Special Limit

11 Total 30% Capital Gain Special Limit Contributions (line 2, column c) 11		
12 30% AGI limitation (line 6 x .30) 12	24043	
13 50% AGI limitation less 50% deduction (line 8 less line 9) 13	37597	
14 2015 deduction (lesser lines 11,12 and 13) (carries to line 2, column d) 14		
15 Carryover to 2016, if any (line 11 less line 14) (carries to line 2, column e) 15		

30% Contribution

16 Total 30% Contribution (line 3, column c) 16		
17 30% AGI (line 6 x .30) 17	24043	
18 50% of AGI limitation less 50% deduction and 30% Capital Gain Special Limitation deduction (line 8 less lines 9 and 14) 18	37597	
19 2015 deduction (lesser of lines 16,17 and 18) (carries to line 3, column d) 19		
20 Carryover to 2016, if any (line 16 less line 19) (carries to line 3, column e) 20		

20% Contributions

21 Total 20% contribution (line 4, column c) 21		
22 20% of AGI (line 6 x .20) 22	16029	
23 30% of AGI limitation less 30% deduction (line 17 less line 19) 23	24043	
24 30% of AGI limitation less 30% Capital Gain Limitation deduction (line 12 less line 14) 24	24043	
25 50% of AGI limitation less 50% and 30% deduction (line 8 less lines 9,14 and 19) 25	37597	
26 2015 deduction (lesser of lines 21,22,23, 24 and 25) (carries to line 4, column d) 26		
27 Carryover to 2016, if any (line 21 less line 26) (carries to line 4, column e) 27		

Qualified Dividends and Capital Gain Tax Worksheet—Line 44

Keep for Your Records



Before you begin: ✓ See the earlier instructions for line 44 to see if you can use this worksheet to figure your tax.
 ✓ Before completing this worksheet, complete Form 1040 through line 43.
 ✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on line 13 of Form 1040.

1.	Enter the amount from Form 1040, line 43. However, if you are filing Form 2555 or 2555-EZ (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet	1.	<u>33208</u>
2.	Enter the amount from Form 1040, line 9b*	2.	<u>325</u>
3.	Are you filing Schedule D? <input checked="" type="checkbox"/> Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0- <input type="checkbox"/> No. Enter the amount from Form 1040, line 13	3.	<u> </u>
4.	Add lines 2 and 3	4.	<u>325</u>
5.	If filing Form 4952 (used to figure investment interest expense deduction), enter any amount from line 4g of that form. Otherwise, enter -0-	5.	<u> </u>
6.	Subtract line 5 from line 4. If zero or less, enter -0-	6.	<u>325</u>
7.	Subtract line 6 from line 1. If zero or less, enter -0-	7.	<u>32883</u>
8.	Enter: \$37,450 if single or married filing separately, \$74,900 if married filing jointly or qualifying widow(er), \$50,200 if head of household.	8.	<u>74900</u>
9.	Enter the smaller of line 1 or line 8	9.	<u>33208</u>
10.	Enter the smaller of line 7 or line 9	10.	<u>32883</u>
11.	Subtract line 10 from line 9. This amount is taxed at 0%	11.	<u>325</u>
12.	Enter the smaller of line 1 or line 6	12.	<u>325</u>
13.	Enter the amount from line 11	13.	<u>325</u>
14.	Subtract line 13 from line 12	14.	<u> </u>
15.	Enter: \$413,200 if single, \$232,425 if married filing separately, \$464,850 if married filing jointly or qualifying widow(er), \$439,000 if head of household.	15.	<u>464850</u>
16.	Enter the smaller of line 1 or line 15	16.	<u>33208</u>
17.	Add lines 7 and 11	17.	<u>33208</u>
18.	Subtract line 17 from line 16. If zero or less, enter -0-	18.	<u> </u>
19.	Enter the smaller of line 14 or line 18	19.	<u> </u>
20.	Multiply line 19 by 15% (0.15)	20.	<u> </u>
21.	Add lines 11 and 19	21.	<u>325</u>
22.	Subtract line 21 from line 12	22.	<u> </u>
23.	Multiply line 22 by 20% (0.20)	23.	<u> </u>
24.	Figure the tax on the amount on line 7. If the amount on line 7 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 7 is \$100,000 or more, use the Tax Computation Worksheet	24.	<u>4009</u>
25.	Add lines 20, 23, and 24	25.	<u>4009</u>
26.	Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet	26.	<u>4061</u>
27.	Tax on all taxable income. Enter the smaller of line 25 or line 26. Also include this amount on Form 1040, line 44. If you are filing Form 2555 or 2555-EZ, do not enter this amount on Form 1040, line 44. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet	27.	<u>4009</u>

*If you are filing Form 2555 or 2555-EZ, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

28% Rate Gain Worksheet—Line 18

Keep for Your Records 

1. Enter the total of all collectibles gain or (loss) from items you reported on Form 8949, Part II	1.	_____
2. Enter as a positive number the total of:		
• Any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), for which you excluded 50% of the gain;	}	
• $\frac{2}{3}$ of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), for which you excluded 60% of the gain; and		
• $\frac{1}{3}$ of any section 1202 exclusion you reported in column (g) of Form 8949, Part II, with code "Q" in column (f), for which you excluded 75% of the gain.		
Do not make an entry for any section 1202 exclusion that is 100% of the gain.		
3. Enter the total of all collectibles gain or (loss) from Form 4684, line 4 (but only if Form 4684, line 15, is more than zero); Form 6252; Form 6781, Part II; and Form 8824	3.	_____
4. Enter the total of any collectibles gain reported to you on:		
• Form 1099-DIV, box 2d;	}	
• Form 2439, box 1d; and		
• Schedule K-1 from a partnership, S corporation, estate, or trust.		
5. Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), box 11, code C	5.	(<u>2534</u>)
6. If Schedule D, line 7, is a (loss), enter that (loss) here. Otherwise, enter -0-	6.	(<u> </u>)
7. Combine lines 1 through 6. If zero or less, enter -0-. If more than zero, also enter this amount on Schedule D, line 18	7.	_____

Unrecaptured Section 1250 Gain Worksheet—Line 19

Keep for Your Records 

If you are not reporting a gain on Form 4797, line 7, skip lines 1 through 9 and go to line 10.

- 1. If you have a section 1250 property in Part III of Form 4797 for which you made an entry in Part I of Form 4797 (but not on Form 6252), enter the **smaller** of line 22 or line 24 of Form 4797 for that property. If you did not have any such property, go to line 4. If you had more than one such property, see instructions 1. _____
- 2. Enter the amount from Form 4797, line 26g, for the property for which you made an entry on line 1 2. _____
- 3. Subtract line 2 from line 1 3. _____
- 4. Enter the total unrecaptured section 1250 gain included on line 26 or line 37 of Form(s) 6252 from installment sales of trade or business property held more than 1 year (see instructions) 4. _____
- 5. Enter the total of any amounts reported to you on a Schedule K-1 from a partnership or an S corporation as "unrecaptured section 1250 gain" 5. _____
- 6. Add lines 3 through 5 6. _____
- 7. Enter the **smaller** of line 6 or the gain from Form 4797, line 7 7. _____
- 8. Enter the amount, if any, from Form 4797, line 8 8. _____
- 9. Subtract line 8 from line 7. If zero or less, enter -0- 9. _____
- 10. Enter the amount of any gain from the sale or exchange of an interest in a partnership attributable to unrecaptured section 1250 gain (see instructions) 10. _____
- 11. Enter the total of any amounts reported to you as "unrecaptured section 1250 gain" on a Schedule K-1, Form 1099-DIV, or Form 2439 from an estate, trust, real estate investment trust, or mutual fund (or other regulated investment company) or in connection with a Form 1099-R 11. _____
- 12. Enter the total of any unrecaptured section 1250 gain from sales (including installment sales) or other dispositions of section 1250 property held more than 1 year for which you did not make an entry in Part I of Form 4797 for the year of sale (see instructions) 12. _____
- 13. Add lines 9 through 12 13. _____
- 14. If you had any section 1202 gain or collectibles gain or (loss), enter the total of lines 1 through 4 of the **28% Rate Gain Worksheet**. Otherwise, enter -0- 14. _____
- 15. Enter the (loss), if any, from Schedule D, line 7. If Schedule D, line 7, is zero or a gain, enter -0- 15. (_____)
- 16. Enter your long-term capital loss carryovers from Schedule D, line 14, and Schedule K-1 (Form 1041), box 11, code C* 16. (_____ 2534)
- 17. Combine lines 14 through 16. If the result is a (loss), enter it as a positive amount. If the result is zero or a gain, enter -0- 17. _____ 2534
- 18. **Unrecaptured section 1250 gain.** Subtract line 17 from line 13. If zero or less, enter -0-. If more than zero, enter the result here and on Schedule D, line 19 18. _____

*If you are filing Form 2555 or 2555-EZ (relating to foreign earned income), see the footnote in the Foreign Earned Income Tax Worksheet in the Form 1040 instructions before completing this line.

Shared Responsibility Payment

To Figure Your Shared Responsibility Payment

- Follow Steps 1 through 5 next.
- Complete [Worksheet A](#) and [Worksheet B](#) if you are directed to them as you complete Steps 1 through 5.
- Complete the [Shared Responsibility Payment Worksheet](#) as directed by Steps 1 through 5 or Worksheets A and B.

Step 1 All Filers

1. Can someone claim you as a dependent?

- Yes.**  **No.** Continue 

You do not owe a shared responsibility payment. Do not check the box on line 6a of Form 1040 or Form 1040A. If you file Form 1040EZ, check the box on line 5.

2. Did you, your spouse (if filing jointly), and everyone you claimed or could have claimed as a dependent have qualifying health coverage for every month of 2015*?

- Yes.**  **No.** Continue 

You do not owe a shared responsibility payment. Check the Full-year coverage checkbox on Form 1040, line 61; Form 1040A, line 38; or Form 1040EZ, line 11.

*You can check the Full-year coverage box if you had or adopted a child during the year, or a member of your tax household died during the year, as long as that person had qualifying health care coverage for every month he or she was a member of your tax household.

3. Do you, your spouse (if filing jointly), or anyone else you claimed or could have claimed as a dependent have qualifying health coverage or qualify for a coverage exemption for any month in 2015?

- Yes.**  **No.** Continue 

Claim any coverage exemption you qualify for on Form 8965. Skip questions 4 and 5; go to Worksheet A.

4. Did you elect not to claim a dependent you could have claimed?

- Yes.**  **No.** Continue 

Skip question 5; go to Worksheet A.

5. Did you, your spouse (if filing jointly), or any of your dependents turn 18 during 2015?

- Yes.** Go to Worksheet A. **No.** Go to Step 2.

Step 2 Flat Dollar Amount

1. Multiply \$325 for each person for whom you claimed an exemption on line 6d of Forms 1040 or 1040A who was at least 18 years old.* Multiply \$325 by each person for whom you did not check a box on Form 1040EZ, line 5, who is at least 18 years old.

1 _____

*For purposes of figuring the shared responsibility payment, an individual is considered under age 18 for an entire month if he or she didn't turn 18 before the first day of the month. An individual turns 18 on the anniversary of the day the individual was born.

2. Multiply \$162.50 for each person for whom you claimed an exemption on line 6d of Forms 1040 or 1040A who was under age 18. Multiply \$162.50 by each person for whom you did not check a box on Form 1040EZ, line 5, who is under age 18.

2 _____

3. Add lines 1 and 2.



3 _____



4. Enter the smaller of line 3 or \$975 here and on line 1 of the [Shared Responsibility Payment Worksheet](#). Go to Step 3.



4 _____

Step 3 Household Income



1. Enter the amount from Form 1040, line 38; Form 1040A, line 21; or Form 1040EZ, line 4.
 1 80144



2. Did you receive any tax-exempt interest?
 Yes. Enter the amount from Form 1040, line 8b; Form 1040A, line 8b; or the amount entered in the space to the left of Form 1040EZ, line 2. 
 No. Continue 
 2 859

3. Did you attach Form 2555 or Form 2555-EZ?
 Yes. Enter the amount from Form 2555, lines 45 and 50; or Form 2555-EZ, line 18. 
 No. Continue 
 3 _____

4. Did you claim any dependents?
 Yes. Continue 
 No.  Add lines 1 through 3. **This is your household income.** Enter the result on Step 4, line 1.
 4 _____

5. Were any of the dependents you claimed required to file a return?
 Yes. Complete questions 1 through 3 for each dependent with a filing requirement for whom you **did not** attach Form 8814. Enter the total here.
 No. Add lines 1 through 3. **This is your household income.** Enter the result on Step 4, line 1.
 5 _____


6. Did you attach Form 8814?
 Yes. Continue 
 No.  Add lines 1, 2, 3, and 5. **This is your household income.** Enter the result on Step 4, line 1.
 6 _____

7. Is Form 8814, line 4 more than \$1,050?
 Yes. Add the amount from Form 8814, line 1b and the smaller of Form 8814, line 4 or 5. 
 No. Enter -0- below. Continue 
 7 _____

8. Add lines 1, 2, 3, 5, and 7. **This is your household income.** Enter the result on Step 4, line 1.
 8 81003

Step 4 Percentage Income Amount

1. Enter your household income from Step 3.
 1 81003

2. Were you or your spouse (if filing jointly) born before January 2, 1951?
 Yes. Skip question 3. Find your filing threshold on the **Filing Thresholds For Most People** chart and enter it both here and on line 4. 
 No. Go to question 3.
 2 21850

3. Enter the amount listed below for your filing status.

- Single—\$10,300
- Head of household—\$13,250
- Married filing jointly—\$20,600
- Married filing separately—\$4,000
- Qualifying widow(er) with dependent child—\$16,600

 3 _____

4. Enter the amount from line 2 or 3.
 4 21850

5. Subtract line 4 from line 1.
 5 59153

6. Is the amount on line 5 zero or less?



- Yes.**  **No.** Continue 

You do not owe a shared responsibility payment. Complete Form 8965 by checking the "Yes" box on line 7a.

7. Multiply line 5 by 2.0% (0.02). This is your percentage of income amount.

7 1183

8. Were you required to complete Worksheet A?

- Yes.** Go to Worksheet B. Continue  **No.**  Enter the amount from line 7 on line 2 of the Shared Responsibility Payment Worksheet and complete line 3 of that worksheet.

Step 5 National Average Bronze Plan Premium

1. Were you required to complete Worksheet A?
 Yes. Continue  **No.** Skip question 2; Go to question 3.

2. Multiply \$207* by the number on [Worksheet A](#), line 8. Enter the result here and on line 4 of the [Shared Responsibility Payment Worksheet](#). Skip question 3 and complete line 5 of the [Shared Responsibility Payment Worksheet](#).

2 621

*\$207 is the 2015 national average premium for a bronze level health plan available through the Marketplace for one individual for one month.

3. Enter on line 4 of the [Shared Responsibility Payment Worksheet](#), the amount below that corresponds to the total number of exemptions you claimed on line 6d of Form 1040 or Form 1040A. If you filed Form 1040EZ, enter the amount below that corresponds to the number of boxes left unchecked on line 5 of Form 1040EZ. Then complete line 5 of the [Shared Responsibility Payment Worksheet](#).

- 1 exemption—\$2,484
- 2 exemptions—\$4,968
- 3 exemptions—\$7,452
- 4 exemptions—\$9,936
- 5 or more exemptions—\$12,420

Shared Responsibility Payment Worksheet

1. Enter the flat dollar amount	1	81
2. Enter the percentage income amount	2	296
3. Enter the larger of line 1 or line 2	3	296
4. Enter the National Average Bronze Plan Premium	4	621
5. Enter the smaller of line 3 or line 4 here and on Form 1040, line 61; Form 1040A, line 38; or Form 1040EZ, line 11. This is your shared responsibility payment	5	296

Worksheet A

Use this worksheet if you were referred here from Step 1 under *Shared Responsibility Payment*. After completing the worksheet, go to Step 3 under *Shared Responsibility Payment*. If everyone in your tax household had either minimum essential coverage or a coverage exemption for every month during 2015, stop here. You do not owe a shared responsibility payment.

Complete the monthly columns by placing "X's" in each month in which you or another member of your tax household had neither minimum essential coverage nor a coverage exemption.												
Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
KARA B BRYANT	X	X	X									
1. Total number of X's in a month. If 5 or more, enter 5	1	1	1									
2. Total number of X's in a month for individuals 18 or over*	1	1	1									
3. One-half the number of X's in a month for individuals under 18*												
4. Add lines 2 and 3 for each month	1.0	1.0	1.0									
5. Multiply line 4 by \$325 for each month. If \$975 or more, enter \$975	325	325	325									
6. Add the amounts for each month on line 5											975	
7. Divide line 6 by 12.0. This is your flat dollar amount. Enter this amount on line 1 of the Shared Responsibility Payment Worksheet.											81	
8. Add the amounts entered for each month on line 1. Go to Step 3											3	
*For purposes of figuring the shared responsibility payment, an individual is considered under 18 for an entire month if he or she didn't turn 18 before the first day of the month. An individual turns 18 on the anniversary of the day the individual was born. For example, someone born on March 1, 2000, is considered age 18 on March 1, 2018, and, therefore, isn't considered age 18 for purposes of the shared responsibility payment until April 2018.												

Worksheet B



Do not complete this worksheet unless you were directed here in Step 4 under *Shared Responsibility Payment*.

For each month, you must determine if the amount on line 5 of Worksheet A is less than the amount on line 7 of Step 4 under <i>Shared Responsibility Payment</i> *	(a)	(b)	(c)
	Enter the amount from line 5	Enter the amount from Step 4, line 7	Enter the larger of column (a) or column (b)
1. January	325	1183	1183
2. February	325	1183	1183
3. March	325	1183	1183
4. April			
5. May			
6. June			
7. July			
8. August			
9. September			
10. October			
11. November			
12. December			
13. Add the amounts in column (c)			3549
14. Divide line 13 by 12.0. Enter the result on lines 2 and 3 of the Shared Responsibility Payment Worksheet. Go to Step 5			296

*If the amount on line 1 of Worksheet A is -0- for any month, leave all columns of this worksheet blank for that month.

Filing Thresholds For Most People

IF your filing status is...	AND at the end of 2015 you were*...	THEN you must file a tax return if your gross income** is more than...
Single	Under 65	\$10,300
	65 or older	\$11,850
Head of Household	Under 65	\$13,250
	65 or older	\$14,800
Married Filing Jointly***	Under 65 (both spouses)	\$20,600
	65 or older (one spouse)	\$21,850
	65 or older (both spouses)	\$23,100
Married Filing Separately	Any age	\$4,000
Qualifying Widow(er) with Dependent children	Under 65	\$16,600
	65 or older	\$17,850

*If you were born on January 1, 1951, you are considered to be age 65 at the end of 2015. (If your spouse died in 2015 or if you are preparing a return for someone who died in 2015, see Pub. 501.)

**Gross income means all income you received in the form of money, goods, property, and services that isn't exempt from tax, including any income from sources outside the United States. It also includes gain from the sale of your main home, even if you can exclude part or all of it. Include only the taxable part of social security benefits (Form 1040, line 20b; Form 1040A, line 14b). Also include gains, but not losses, reported on Form 8949 or Schedule D. Gross income from a business means, for example, the amount on Schedule C, line 7, or Schedule F, line 9. But, in figuring gross income, don't reduce your income by any losses, including any loss on Schedule C, line 7, or Schedule F, line 9.

***If you did not live with your spouse at the end of 2015 (or on the date your spouse died) and your gross income was at least \$4,000, you must file a return regardless of your age.

Credit Limit Worksheet - Form 2441, Line 10

Complete this worksheet to figure the amount to enter on line 10.

- 1. Enter the amount from Form 1040, line 47; Form 1040 A, line 28; or Form 1040NR, line 45 1. 4009

- 2. Enter the amount from Form 1040, line 48, or Form 1040NR, line 46; Form 1040A filers enter -0- 2. 4

- 3. Subtract line 2 from line 1. Also enter this amount on Form 2441, line 10. But if zero or less, **stop**; you cannot take the credit 3. 4005

Nonbusiness Energy Property Credit Limit Worksheet—Line 29

- | | | |
|---|----|--------------------|
| 1. Enter the amount from Form 1040, line 47, or Form 1040NR, line 45 | 1. | <u>4009</u> |
| 2. Enter the total, if any, of your credits from Form 1040, lines 48 through 51, and Schedule R, line 22; or Form 1040NR, lines 46 through 48 | 2. | <u>1834</u> |
| 3. Subtract line 2 from line 1. Also enter this amount on Form 5695, line 29. If zero or less, stop ; you cannot take the nonbusiness energy property credit | 3. | <u><u>2175</u></u> |

MARX B
Residential Energy Efficient Property Credit
Limit Worksheet—Line 14

881-00-0002

Lifetime Limitation Worksheet—Line 18

1. Enter the amount from Form 1040, line 47, or Form 1040NR, line 45	1. <u>4009</u>
2. Enter the total, if any, of your credits from Form 1040, lines 48 through 51, and Schedule R, line 22; or Form 1040NR, lines 46 through 48	2. <u>1834</u>
3. Enter the amount, if any, from Form 5695, line 30	3. <u>195</u>
4. If you are filing Form 2555 or Form 2555-EZ, enter the amount, if any, from line 13 of the Child Tax Credit Worksheet in Pub. 972. Otherwise, enter the amount, if any, from line 12 of the Line 11 Worksheet in Pub. 972	4. _____
5. Enter the amount, if any, from Form 8396, line 9	5. _____
6. Enter the amount, if any, from Form 8839, line 16	6. _____
7. Enter the amount, if any, from Form 8859, line 3	7. _____
8. Enter the amount, if any, from Form 8910, line 15	8. _____
9. Enter the amount, if any, from Form 8936, line 23	9. _____
10. Add lines 2 through 9	10. <u>2029</u>
11. Subtract line 10 from line 1. Also enter this amount on Form 5695, line 14. If zero or less, enter -0- on Form 5695, lines 14 and 15	11. <u><u>1980</u></u>

1. Enter the amount, if any, from your 2006 Form 5695, line 12	1. <u>305</u>
2. Enter the amount, if any, from your 2007 Form 5695, line 15	2. _____
3. Enter the amount, if any, from your 2009 Form 5695, line 11	3. _____
4. Enter the amount, if any, from your 2010 Form 5695, line 11	4. _____
5. Enter the amount, if any, from your 2011 Form 5695, line 14	5. _____
6. Enter the amount, if any, from your 2012 Form 5695, line 32	6. _____
7. Enter the amount, if any, from your 2013 Form 5695, line 30	7. _____
8. Enter the amount, if any, from your 2014 Form 5695, line 30	8. _____
9. Add lines 1 through 8. Also enter this amount on Form 5695, line 18. If \$500 or more, stop ; you cannot take the nonbusiness energy property credit	9. <u><u>305</u></u>

Credit Limit Worksheet

Complete the credit limit worksheet to figure the amount to enter on line 19.

1.	Enter the amount from Form 8863, line 18	1.	<u>200</u>
2.	Enter the amount from Form 8863, Line 9	2.	<u>1410</u>
3.	Add lines 1 and 2	3.	<u>1610</u>
4.	Enter the amount from: Form 1040, line 47; or Form 1040A, line 30	4.	<u>4009</u>
5.	Enter the total of your credits from either: Form 1040, lines 48 and 49, and Schedule R, line 22; or Form 1040A, lines 31 and 32	5.	<u>224</u>
6.	Subtract line 5 from line 4	6.	<u>3785</u>
7.	Enter the smaller of line 3 or line 6 here and on Form 8863, line 19.	7.	<u>1610</u>

Simplified Method Worksheet—Lines 16a and 16b

Keep for Your Records



Before you begin: ✓ If you are the beneficiary of a deceased employee or former employee who died **before** August 21, 1996, include any death benefit exclusion that you are entitled to (up to \$5,000) in the amount entered on line 2 below.

More than one pension or annuity. If you had more than one partially taxable pension or annuity, figure the taxable part of each separately. Enter the total of the taxable parts on Form 1040, line 16b. Enter the total pension or annuity payments received in 2015 on Form 1040, line 16a.

1.	Enter the total pension or annuity payments from Form 1099-R, box 1. Also, enter this amount on Form 1040, line 16a	1.	18625
2.	Enter your cost in the plan at the annuity starting date	2.	5864
	Note. If you completed this worksheet last year, skip line 3 and enter the amount from line 4 of last year's worksheet on line 4 below (even if the amount of your pension or annuity has changed). Otherwise, go to line 3.		01/01/2014
3.	Enter the appropriate number from Table 1 below. But if your annuity starting date was after 1997 and the payments are for your life and that of your beneficiary, enter the appropriate number from Table 2 below	3.	210
4.	Divide line 2 by the number on line 3	4.	27.92
5.	Multiply line 4 by the number of months for which this year's payments were made. If your annuity starting date was before 1987, skip lines 6 and 7 and enter this amount on line 8. Otherwise, go to line 6	5.	335
6.	Enter the amount, if any, recovered tax free in years after 1986. If you completed this worksheet last year, enter the amount from line 10 of last year's worksheet	6.	335
7.	Subtract line 6 from line 2	7.	5529
8.	Enter the smaller of line 5 or line 7	8.	335
9.	Taxable amount. Subtract line 8 from line 1. Enter the result, but not less than zero. Also, enter this amount on Form 1040, line 16b. If your Form 1099-R shows a larger amount, use the amount on this line instead of the amount from Form 1099-R. If you are a retired public safety officer, see <i>Insurance Premiums for Retired Public Safety Officers</i> before entering an amount on line 16b	9.	18290
10.	Was your annuity starting date before 1987? <input type="checkbox"/> Yes. Do not complete the rest of this worksheet. <input checked="" type="checkbox"/> No. Add lines 6 and 8. This is the amount you have recovered tax free through 2015. You will need this number if you need to fill out this worksheet next year	10.	670
11.	Balance of cost to be recovered. Subtract line 10 from line 2. If zero, you won't have to complete this worksheet next year. The payments you receive next year will generally be fully taxable	11.	5194

Table 1 for Line 3 Above

AND your annuity starting date was—

IF the age at annuity starting date was . . .	before November 19, 1996, enter on line 3 . . .	after November 18, 1996, enter on line 3 . . .
55 or under	300	360
56–60	260	310
61–65	240	260
66–70	170	210
71 or older	120	160

Table 2 for Line 3 Above

IF the combined ages at annuity starting date were . . .	THEN enter on line 3 . . .
110 or under	410
111–120	360
121–130	310
131–140	260
141 or older	210

Worksheet 1. Figuring Your Taxable Benefits

Keep for Your Records



Before you begin:

- If you are married filing separately and you lived apart from your spouse for all of 2015, enter "D" to the right of the word "benefits" on Form 1040, line 20a, or Form 1040A, line 14a.
- Do not use this worksheet if you repaid benefits in 2015 and your total repayments (box 4 of Forms SSA-1099 and RRB-1099) were more than your gross benefits for 2015 (box 3 of Forms SSA-1099 and RRB-1099). None of your benefits are taxable for 2015. For more information, see [Repayments More Than Gross Benefits](#).
- If you are filing Form 8815, Exclusion of Interest From Series EE and I U.S. Savings Bonds Issued After 1989, do not include the amount from line 8a of Form 1040 or Form 1040A on line 3 of this worksheet. Instead, include the amount from Schedule B (Form 1040A or 1040), line 2.

1. Enter the total amount from box 5 of ALL your Forms SSA-1099 and RRB-1099. Also enter this amount on Form 1040, line 20a, or Form 1040A, line 14a	1.	<u>13682</u>	
2. Enter one-half of line 1	2.	<u>6841</u>	
3. Combine the amounts from: Form 1040: Lines 7, 8a, 9a, 10 through 14, 15b, 16b, 17 through 19, and 21 Form 1040A: Lines 7, 8a, 9a, 10, 11b, 12b, and 13	3.	<u>75735</u>	
4. Enter the amount, if any, from Form 1040 or 1040A, line 8b	4.	<u>859</u>	
5. Enter the total of any exclusions/adjustments for: • Adoption benefits (Form 8839, line 28), • Foreign earned income or housing (Form 2555, lines 45 and 50, or Form 2555-EZ, line 18), and • Certain income of bona fide residents of American Samoa (Form 4563, line 15) or Puerto Rico	5.		
6. Combine lines 2, 3, 4, and 5	6.	<u>83435</u>	
7. Form 1040 filers: Enter the amounts from Form 1040, lines 23 through 32, and any write-in adjustments you entered on the dotted line next to line 36. Form 1040A filers: Enter the amounts from Form 1040A, lines 16 and 17	7.	<u>6953</u>	
8. Is the amount on line 7 less than the amount on line 6? No. None of your social security benefits are taxable. Enter -0- on Form 1040, line 20b, or Form 1040A, line 14b. X Yes. Subtract line 7 from line 6	8.	<u>76482</u>	
9. If you are: • Married filing jointly, enter \$32,000 • Single, head of household, qualifying widow(er), or married filing separately and you lived apart from your spouse for all of 2015, enter \$25,000	9.	<u>32000</u>	
Note. If you are married filing separately and you lived with your spouse at any time in 2015, skip lines 9 through 16; multiply line 8 by 85% (0.85) and enter the result on line 17. Then go to line 18.			
10. Is the amount on line 9 less than the amount on line 8? No. None of your benefits are taxable. Enter -0- on Form 1040, line 20b, or on Form 1040A, line 14b. If you are married filing separately and you lived apart from your spouse for all of 2015, be sure you entered "D" to the right of the word "benefits" on Form 1040, line 20a, or on Form 1040A, line 14a. X Yes. Subtract line 9 from line 8	10.	<u>44482</u>	
11. Enter \$12,000 if married filing jointly; \$9,000 if single, head of household, qualifying widow(er), or married filing separately and you lived apart from your spouse for all of 2015	11.	<u>12000</u>	
12. Subtract line 11 from line 10. If zero or less, enter -0-	12.	<u>32482</u>	
13. Enter the smaller of line 10 or line 11	13.	<u>12000</u>	
14. Enter one-half of line 13	14.	<u>6000</u>	
15. Enter the smaller of line 2 or line 14	15.	<u>6000</u>	
16. Multiply line 12 by 85% (0.85). If line 12 is zero, enter -0-	16.	<u>27610</u>	
17. Add lines 15 and 16	17.	<u>33610</u>	
18. Multiply line 1 by 85% (0.85)	18.	<u>11630</u>	
19. Taxable benefits. Enter the smaller of line 17 or line 18. Also enter this amount on Form 1040, line 20b, or Form 1040A, line 14b	19.	<u>11630</u>	



If you received a lump-sum payment in 2015 that was for an earlier year, also complete Worksheet 2 or 3 and Worksheet 4 to see if you can report a lower taxable benefit.


IRA Deduction Worksheet—Line 32

Keep for Your Records 




If you were age 70½ or older at the end of 2015, you can't deduct any contributions made to your traditional IRA or treat them as nondeductible contributions. **Do not** complete this worksheet for anyone age 70½ or older at the end of 2015. If you are married filing jointly and only one spouse was under age 70½ at the end of 2015, complete this worksheet only for that spouse.

Before you begin: ✓ Be sure you have read the 11-item list in the instructions for this line. You may not be able to use this worksheet.
 ✓ Figure any write-in adjustments to be entered on the dotted line next to line 36 (see the instructions for line 36).
 ✓ If you are married filing separately and you lived apart from your spouse for all of 2015, enter "D" on the dotted line next to Form 1040, line 32. If you do not, you may get a math error notice from the IRS.

	Your IRA	Spouse's IRA
1a. Were you covered by a retirement plan (see <i>Were You Covered by a Retirement Plan?</i>)?	1a. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
b. If married filing jointly, was your spouse covered by a retirement plan?		1b. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<p>Next. If you checked "No" on line 1a (and "No" on line 1b if married filing jointly), skip lines 2 through 6, enter the applicable amount below on line 7a (and line 7b if applicable), and go to line 8.</p> <ul style="list-style-type: none"> • \$5,500, if under age 50 at the end of 2015. • \$6,500, if age 50 or older but under age 70½ at the end of 2015. <p>Otherwise, go to line 2.</p>		
2. Enter the amount shown below that applies to you.		
<ul style="list-style-type: none"> • Single, head of household, or married filing separately and you lived apart from your spouse for all of 2015, enter \$71,000. • Qualifying widow(er), enter \$118,000. • Married filing jointly, enter \$118,000 in both columns. But if you checked "No" on either line 1a or 1b, enter \$193,000 for the person who wasn't covered by a plan. • Married filing separately and you lived with your spouse at any time in 2015, enter \$10,000. 	2a. <u>118000</u>	2b. <u>193000</u>
3. Enter the amount from Form 1040, line 22	3. <u>87365</u>	
4. Enter the total of the amounts from Form 1040, lines 23 through 31a, plus any write-in adjustments you entered on the dotted line next to line 36	4. <u>3953</u>	
5. Subtract line 4 from line 3. If married filing jointly, enter the result in both columns	5a. <u>83412</u>	5b. <u>83412</u>
6. Is the amount on line 5 less than the amount on line 2?		
<input type="checkbox"/> No.  None of your IRA contributions are deductible. For details on nondeductible IRA contributions, see Form 8606.		
<input checked="" type="checkbox"/> Yes. Subtract line 5 from line 2 in each column. Follow the instruction below that applies to you.		
<ul style="list-style-type: none"> • If single, head of household, or married filing separately, and the result is \$10,000 or more, enter the applicable amount below on line 7 for that column and go to line 8. <ul style="list-style-type: none"> i. \$5,500, if under age 50 at the end of 2015. ii. \$6,500, if age 50 or older but under age 70½ at the end of 2015. • If married filing jointly or qualifying widow(er), and the result is \$20,000 or more (\$10,000 or more in the column for the IRA of a person who wasn't covered by a retirement plan), enter the applicable amount below on line 7 for that column and go to line 8. <ul style="list-style-type: none"> i. \$5,500, if under age 50 at the end of 2015. ii. \$6,500 if age 50 or older but under age 70½ at the end of 2015. <p>Otherwise, go to line 7.</p>	6a. <u>34588</u>	6b. <u>109588</u>

IRA Deduction Worksheet—Continued

	Your IRA	Spouse's IRA
<p>7. Multiply lines 6a and 6b by the percentage below that applies to you. If the result isn't a multiple of \$10, increase it to the next multiple of \$10 (for example, increase \$490.30 to \$500). If the result is \$200 or more, enter the result. But if it is less than \$200, enter \$200.</p> <ul style="list-style-type: none"> • Single, head of household, or married filing separately, multiply by 55% (0.55) (or by 65% (0.65) in the column for the IRA of a person who is age 50 or older at the end of 2015). • Married filing jointly or qualifying widow(er), multiply by 27.5% (0.275) (or by 32.5% (0.325) in the column for the IRA of a person who is age 50 or older at the end of 2015). But if you checked "No" on either line 1a or 1b, then in the column for the IRA of the person who wasn't covered by a retirement plan, multiply by 55% (0.55) (or by 65% (0.65) if age 50 or older at the end of 2015). 	7a. <u>6500</u>	7b. <u>6500</u>
<p>8. Enter the total of your (and your spouse's if filing jointly):</p> <ul style="list-style-type: none"> • Wages, salaries, tips, etc. Generally, this is the amount reported in box 1 of Form W-2. Exceptions are explained earlier in these instructions for line 32. • Alimony and separate maintenance payments reported on Form 1040, line 11. • Nontaxable combat pay. This amount should be reported in box 12 of Form W-2 with code Q. 	8. <u>41951</u>	
<p>9. Enter the earned income you (and your spouse if filing jointly) received as a self-employed individual or a partner. Generally, this is your (and your spouse's if filing jointly) net earnings from self-employment if your personal services were a material income-producing factor, minus any deductions on Form 1040, lines 27 and 28. If zero or less, enter -0-. For more details, see Pub. 590-A</p>	9. <u>2197</u>	
<p>10. Add lines 8 and 9</p>	10. <u>44148</u>	
<div style="display: flex; align-items: flex-start;"> <div style="text-align: center; margin-right: 10px;">  <p>CAUTION</p> </div> <div> <p><i>If married filing jointly and line 10 is less than \$11,000 (\$12,000 if one spouse is age 50 or older at the end of 2015; \$13,000 if both spouses are age 50 or older at the end of 2015), stop here and use the worksheet in Pub. 590-A to figure your IRA deduction.</i></p> </div> </div>		
<p>11. Enter traditional IRA contributions made, or that will be made by the due date of your 2015 return not counting extensions (April 18, 2016, for most people), for 2015 to your IRA on line 11a and to your spouse's IRA on line 11b</p>	11a. _____	11b. <u>3000</u>
<p>12. On line 12a, enter the smallest of line 7a, 10, or 11a. On line 12b, enter the smallest of line 7b, 10, or 11b. This is the most you can deduct. Add the amounts on lines 12a and 12b and enter the total on Form 1040, line 32. Or, if you want, you can deduct a smaller amount and treat the rest as a nondeductible contribution (see Form 8606)</p>	12a. _____	12b. <u>3000</u>

Worksheet 4-1. **Student Loan Interest Deduction Worksheet**

Keep for Your Records 

Use this worksheet instead of the worksheet in the Form 1040 instructions if you are filing **Form 2555, 2555-EZ, or 4563**, or you are excluding income from sources within Puerto Rico. Before using this worksheet, you must complete **Form 1040**; lines 7 through 32, plus any amount to be entered on the dotted line next to line 36.

1.	Enter the total interest you paid in 2015 on qualified student loans. Don't enter more than \$2,500	1.	<u>268</u>
2.	Enter the amount from Form 1040, line 22	2.	<u>87365</u>
3.	Enter the total of the amounts from Form 1040, lines 23 through 32	3.	<u>6953</u>
4.	Enter the total of any amounts entered on the dotted line next to Form 1040, line 36	4.	_____
5.	Add lines 3 and 4	5.	<u>6953</u>
6.	Subtract line 5 from line 2	6.	<u>80412</u>
7.	Enter any foreign earned income exclusion and/or housing exclusion (Form 2555, line 45; or Form 2555-EZ, line 18)	7.	_____
8.	Enter any foreign housing deduction (Form 2555, line 50)	8.	_____
9.	Enter the amount of income from Puerto Rico you are excluding	9.	_____
10.	Enter the amount of income from American Samoa you are excluding (Form 4563, line 15)	10.	_____
11.	Add lines 6 through 10. This is your modified adjusted gross income	11.	<u>80412</u>
12.	Enter the amount shown below for your filing status	12.	<u>130000</u>
	• Single, head of household, or qualifying widow(er)—\$65,000		
	• Married filing jointly—\$130,000		
13.	Is the amount on line 11 more than the amount on line 12?		
	<input checked="" type="checkbox"/> No. Skip lines 13 and 14, enter -0- on line 15, and go to line 16.		
	<input type="checkbox"/> Yes. Subtract line 12 from line 11	13.	_____
14.	Divide line 13 by \$15,000 (\$30,000 if married filing jointly). Enter the result as a decimal (rounded to at least three places). If the result is 1.000 or more, enter 1.000	14.	_____
15.	Multiply line 1 by line 14	15.	_____
16.	Student loan interest deduction. Subtract line 15 from line 1. Enter the result here and on Form 1040, line 33. Don't include this amount in figuring any other deduction on your return (such as on Schedule A, C, E, etc.)	16.	<u>268</u>

STATE OF NEW JERSEY INCOME TAX – RESIDENT RETURN

NJ-1040
2015
Page 1



For Privacy Act Notification, See Instructions
For Tax Year Jan. – Dec. 2015 or Other Tax Year
Beginning _____, 20__ Month Ending _____, 20__
On-line Federal Extension Confirmation # _____

MARX B KARL R & BRYANT KARA B

123 ELM

PLUCKEMIN NJ 07978 1801

1038 12

881000002 882000002

S12345678

50001 00002



Under the penalties of perjury, I declare that I have examined this income tax return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete. If prepared by a person other than the taxpayer, this declaration is based on all information of which the preparer has any knowledge.

> _____
Your Signature Date

> _____
Spouse/CU Partner's Signature (If filed jointly both must sign)

Fill in if NJ-1040-O is enclosed

If enclosing copy of death certificate for deceased taxpayer, check box (See instruction page 11)

Paid Preparer's Signature

Federal Identification Number
S12345678

Firm's Name PRACTICE LAB

Federal Employer Identification Number

15 PRACTICE LAB WAY WASHINGTON DC 20005

Pay amount on Line 56 in full. Write Social Security number(s) on check or money order and make payable to: STATE OF NEW JERSEY – TGI

Mail your return in the envelope provided and affix the appropriate mailing label.

If you have an amount due on Line 56, enclose your check and NJ-1040-V payment voucher with your return and use the label for **PO Box 111**.

If not, use the label for **PO Box 555**. You may also pay by e-check or credit card. See instruction page 11.



MARX B KARL R & BRYANT KARA B

881000002

1038

Residency Status IF YOU WERE A NEW JERSEY RESIDENT FOR ONLY PART OF THE TAXABLE YEAR GIVE THE PERIOD OF NEW JERSEY RESIDENCY FROM TO

FILING STATUS

- 1. SINGLE
2. MARRIED/CU COUPLE FILING JOINT RETURN X
3. MARRIED/CU COUPLE FILING SEPARATE RETURN
4. HEAD OF HOUSEHOLD
5. QUALIFYING WIDOW(ER)/SURVIVING CU PARTNER

EXEMPTIONS

- 6. REGULAR 2
7. AGE 65 OR OVER 1
8. BLIND OR DISABLED
9. NUMBER OF QUALIFIED DEPENDENT CHILDREN 3
10. NUMBER OF OTHER DEPENDENTS
11. DEPENDENTS ATTENDING COLLEGE 1
12A. TOTAL (LINE 12A - ADD LINES 6, 7, 8, AND 11) 4
12B. TOTAL (LINE 12B - ADD LINES 9 AND 10) 3

CHECKBOXES FOR EXEMPTIONS

- REGULAR SPOUSE/CU PARTNER X DOMESTIC PARTNER
AGE 65 OR OLDER YOURSELF X SPOUSE/CU PARTNER
BLIND OR DISABLED YOURSELF SPOUSE/CU PARTNER

DEPENDENT'S INFORMATION FROM LINES 9 AND 10 (ATTACH RIDER IF MORE THAN FOUR)

Table with columns: LAST NAME, FIRST NAME, MIDDLE INITIAL, SOCIAL SECURITY NUMBER, BIRTH YEAR, HEALTH INS IND. Rows include KENT KENDRA, THOMAS DAVID, BRYANT CARMEN.

GUBERNATORIAL ELECTIONS FUND

DO YOU WISH TO DESIGNATE \$1 OF YOUR TAXES FOR THIS FUND? YES NO X
IF JOINT RETURN. DOES YOUR SPOUSE/CU PARTNER WISH TO DESIGNATE \$1? YES X NO

Main tax schedule table with 36 rows. Columns include line number, description, and amount. Total taxable income is 24458.



MARX B KARL R & BRYANT KARA B

881000002

1038

37A. TOTAL PROPERTY TAXES PAID (SEE INSTRUCTION PAGE 29)	37A.	7135 .
37B. BLOCK, LOT, AND QUALIFIER (TO BE ENTERED ON PAGE 1)	37B.	
37C. COUNTY/MUNICIPALITY CODE (TO BE ENTERED ON PAGE 1)	37C.	
38. PROPERTY TAX DEDUCTION (SEE INSTRUCTION PAGE 32)	38.	7135 .
39. NEW JERSEY TAXABLE INCOME (SUBTRACT LINE 38 FROM LINE 36) IF ZERO OR LESS, MAKE NO ENTRY	39.	17323 .
40. TAX (FROM TAX TABLES, PAGE 53)	40.	243 .
41. CREDIT FOR INCOME TAXES PAID TO OTHER JURISDICTIONS	41.	.
41A. JURISDICTION CODE (SEE INSTRUCTIONS)	41A.	
42. BALANCE OF TAX (SUBTRACT LINE 41 FROM LINE 40)	42.	243 .
43. SHELTERED WORKSHOP TAX CREDIT	43.	.
44. BALANCE OF TAX AFTER CREDIT (SUBTRACT LINE 43 FROM LINE 42)	44.	243 .
45. USE TAX DUE ON INTERNET, MAIL-ORDER, OR OTHER OUT-OF-STATE PURCHASES (SEE WKST AND INSTR. PAGE 36) IF NO USE TAX, ENTER ZERO	45.	84 .
46. PENALTY FOR UNDERPAYMENT OF ESTIMATED TAX	46.	.
46A. FILL IN IF FORM 2210 IS ENCLOSED	46A.	
47. TOTAL TAX AND PENALTY (ADD LINES 44, 45, AND 46)	47.	327 .
48. TOTAL NEW JERSEY INCOME TAX WITHHELD (ENCLOSE FORMS W-2 AND 1099)	48.	2367 .
49. PROPERTY TAX CREDIT (SEE INSTRUCTION PAGE 32)	49.	.
50. NEW JERSEY ESTIMATED TAX PAYMENTS/CREDIT FROM 2014 TAX RETURN	50.	590 .
51. NEW JERSEY EARNED INCOME TAX CREDIT (SEE INSTRUCTION PAGE 38)	51.	.
51B. FILL IN THE BOX IF YOU HAD THE IRS FIGURE YOUR FEDERAL EARNED INCOME CREDIT	51B.	
51C. FILL IN THE BOX IF YOU ARE A CU COUPLE CLAIMING THE NJ EARNED INCOME TAX CREDIT	51C.	
52. EXCESS NEW JERSEY UI/SF/SWF WITHHELD (SEE INSTRUCTION PAGE 39) (ENCLOSE FORM NJ-2450)	52.	.
53. EXCESS DISABILITY INSURANCE WITHHELD (SEE INSTRUCTION PAGE 39) (ENCLOSE FORM NJ-2450)	53.	.
54. EXCESS NEW JERSEY FAMILY LEAVE WITHHELD (SEE INSTRUCTION PAGE 39) (ENCLOSE FORM NJ-2450)	54.	.
55. TOTAL PAYMENTS/CREDITS (ADD LINES 48 THROUGH 54)	55.	2957 .
56. IF LINE 55 IS LESS THAN LINE 47, ENTER AMOUNT YOU OWE IF YOU OWE TAX, YOU MAY MAKE A DONATION BY ENTERING AN AMOUNT ON LINES 59, 60, 61, 62, 63, AND/OR 64 AND ADDING THIS TO YOUR PAYMENT AMOUNT	56.	.
57. IF LINE 55 IS MORE THAN LINE 47, ENTER OVERPAYMENT DEDUCTIONS FROM OVERPAYMENT ON LINE 57 WHICH YOU ELECT TO CREDIT TO:	57.	2630 .
58. YOUR 2016 TAX	58.	.
59. NEW JERSEY ENDANGERED WILDLIFE FUND	59.	.
60. NEW JERSEY CHILDREN'S TRUST FUND	60.	.
61. NEW JERSEY VIETNAM VETERANS' MEMORIAL FUND	61.	.
62. NEW JERSEY BREAST CANCER RESEARCH FUND	62.	.
63. U.S.S. NEW JERSEY EDUCATIONAL MUSEUM FUND	63.	.
64. OTHER DESIGNATED CONTRIBUTION (SEE INSTRUCTION PAGE 40)	64.	.
64C. DESIGNATION CODE	64C.	
65. TOTAL DEDUCTIONS FROM OVERPAYMENT (ADD LINES 58 THROUGH 64)	65.	.
66. REFUND (AMOUNT TO BE SENT TO YOU. SUBTRACT LINE 65 FROM LINE 57)	66.	2630 .

DIRECT DEPOSIT INFORMATION

dd1. REFUND CHECK BOX ('1' FOR REFUND, '4' FOR NO REFUND)	dd1.	4
dd2. ACCOUNT TYPE ('C' FOR CHECKING, 'S' FOR SAVINGS)	dd2.	
dd3. FILL IN THE CHECKBOX IF REFUND IS GOING TO AN ACCOUNT OUTSIDE THE UNITED STATES	dd3.	
dd4. ROUTING NUMBER	dd4.	
dd5. ACCOUNT NUMBER	dd5.	
dnm. DO NOT MAIL INDICATOR	dnm.	X
pa. POWER OF ATTORNEY INDICATOR	pa.	
pdr. PRESIDENTIAL DISASTER RELIEF INDICATOR	pdr.	

SCHEDULES

A & B

(Form NJ-1040)

NEW JERSEY GROSS INCOME TAX

2015

Name(s) as shown on Form NJ-1040 MARX B KARL R & BRYANT KARA B	Your Social Security Number 881 00 0002
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Schedule A CREDIT FOR INCOME OR WAGE TAXES PAID TO OTHER JURISDICTION If you are claiming a credit for income taxes paid to more than one jurisdiction, a separate Schedule A must be enclosed for each. See instructions page 41.

A COPY OF OTHER STATE OR POLITICAL SUBDIVISION TAX RETURN MUST BE RETAINED WITH YOUR RECORDS

1. Income properly taxed by both New Jersey and other jurisdiction during tax year. See instructions page 41. (Indicate jurisdiction name _____) (DO NOT combine the same income taxed by more than one jurisdiction) (The amount on Line 1 cannot exceed the amount shown on Line 2)	1.			
2. Income subject to tax by New Jersey (From Line 28, Form NJ-1040)	2.			
3. Maximum Allowable Credit Percentage 1 _____ (Divide Line 2 into Line 1) 2 _____	3.		%	
IF YOU ARE NOT ELIGIBLE FOR A PROPERTY TAX BENEFIT ONLY COMPLETE COLUMN B.				
4. Taxable Income (after Exemptions and Deductions) from Line 36, Form NJ-1040	4.	COLUMN A	COLUMN B	
5. Property Tax and Deduction Enter in Box 5a the amount from Worksheet F, line 1. See instructions page 33. Property tax deduction. Enter the amount from Worksheet F, line 2. See instructions page 33.	5.		- 0 -	
6. New Jersey Taxable Income (Line 4 minus Line 5)	6.			
7. Tax on Line 6 amount (From Tax Table or Tax Rate Schedules)	7.			
8. Allowable Credit (Line 3 times Line 7)	8.			
9. Credit for Taxes Paid to Other Jurisdiction Enter in Box 9a the income or wage tax paid to other jurisdiction during tax year on income shown on Line 1. See instructions page 44. Credit allowed. (Enter lesser of Line 8 or Box 9a). (The credit may not exceed your New Jersey tax on Line 40).	9.			

- If you are not eligible for a property tax benefit, enter the amount from Line 9, Column B, on Line 41, Form NJ-1040. Make no entry on Lines 38 or 49, Form NJ-1040.
- If you are eligible for a property tax benefit, you must complete Worksheet I on page 43 to determine whether you receive a greater benefit by claiming a property tax deduction or taking the property tax credit.

Schedule B NET GAINS OR INCOME FROM DISPOSITION OF PROPERTY List the net gains or income, less net loss, derived from the sale, exchange, or other disposition of property including real or personal whether tangible or intangible.

1.	a. Kind of property and description	b. Date acquired (Mo., day, yr.)	c. Date sold (Mo., day, yr.)	d. Gross sales price	e. Cost or other basis as adjusted (see instructions) and expense of sale	f. Gain or (loss) (d less e)
	SEE ATTACHED STATEMENT					
2.	Capital Gains Distributions					69
3.	Other Net Gains					357
4.	Net Gains (Add Lines 1, 2, and 3) (Enter here and on Line 18. If loss enter ZERO here and make no entry on Line 18)					1812

**SCHEDULE
NJ-BUS-1**
(Form NJ-1040)

**NEW JERSEY GROSS INCOME TAX
BUSINESS INCOME SUMMARY SCHEDULE**

2015

Name(s) as shown on Form NJ-1040 MARX B KARL R & BRYANT KARA B	Your Social Security Number 881 00 0002
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PART I NET PROFITS FROM BUSINESS List the net profit (loss) from business(es). See instructions.

	Business Name	Social Security Number/ Federal EIN	Profit or (Loss)
1.	KARA B BRYANT	882-00-0002	2364
2.			
3.			
4.	Net Profit or (Loss). (Add Lines 1, 2, and 3.) (Enter here and on Line 17. If loss, make no entry on Line 17.)		4. 2364

PART II DISTRIBUTIVE SHARE OF PARTNERSHIP INCOME List the distributive share of income (loss) from partnership(s). See instructions.

	Partnership Name	Federal EIN	Share of Partnership Income or (Loss)
1.	ACME PARTNERS	91-5009999	
2.			
3.			
4.	Distributive Share of Partnership Income or (Loss). (Add Lines 1, 2, and 3.) (Enter here and on Line 20. If loss, make no entry on Line 20.)		4.

PART III NET PRO RATA SHARE OF S CORPORATION INCOME List the pro rata share of income (usable loss) from S corporation(s). See instructions.

	S Corporation Name	Federal EIN	Pro Rata Share of S Corporation Income or (Usable Loss)
1.			
2.			
3.			
4.	Net Pro Rata Share of S Corporation Income or (Usable Loss). (Add Lines 1, 2, and 3.) (Enter here and on Line 21. If loss, make no entry on Line 21.)		4.

PART IV NET GAINS OR INCOME FROM RENTS, ROYALTIES, PATENTS, AND COPYRIGHTS List the net gains or net income, less net loss, derived from or in the form of rents, royalties, patents, and copyrights. See instructions.
Type of Property: 1-Rental real estate 2-Royalties 3-Patents 4-Copyrights

	Source of Income or Loss. If rental real estate, enter physical address of property.	Social Security Number/ Federal EIN	Type - Enter number from list above	Income or (Loss)
1.	ACME PARTNERS	881-00-0002	1	650
2.				
3.				
4.	Net Income or (Loss). (Add Lines 1, 2, and 3.) (Enter here and on Line 22. If loss, make no entry on Line 22.)			4. 650

**SCHEDULE
NJ-BUS-2**
(Form NJ-1040)

**NEW JERSEY GROSS INCOME TAX
ALTERNATIVE BUSINESS CALCULATION ADJUSTMENT**

2015

Name(s) as shown on Form NJ-1040 MARX B KARL R & BRYANT KARA B				Your Social Security Number 881 00 0002		
PART I INCOME (LOSS)		Column A		Column B		
		Reportable Regular Business Income		Alternative Business Income/(Loss)		
1.	Net Profits From Business	1a.	2364	1b.	2364	
2.	Distributive Share of Partnership Income	2a.		2b.		
3.	Net Pro Rata Share of S Corporation Income	3a.		3b.		
4.	Net Gain or Income From Rents, Royalties, Patents, and Copyrights	4a.	650	4b.	650	
5.	Loss Carryforward From Tax Year 2014			5b.	()
6.	Totals	6a.	3014	6b.	3014	
PART II ADJUSTMENT CALCULATION						
7.	Total Regular Business Income	7.	3014			
8.	Total Alternative Business Income/(Loss). (If loss, enter zero)	8.	3014			
9.	Business Increment (Line 7 minus Line 8)	9.				
10.	Adjustment Percentage	10.	0.40			
11.	Alternative Business Calculation Adjustment (Line 9 x 0.40)	11.				
PART III LOSS CARRYFORWARD TO TAX YEAR 2016						
12.	Loss Carryforward to Tax Year 2016	12.	()		

Instructions

- Line 1a. Enter the amount from Line 17 of Form NJ-1040.
- Line 1b. Enter the amount from Part I, Line 4 of Schedule NJ-BUS-1 (Form NJ-1040).
- Line 2a. Enter the amount from Line 20 of Form NJ-1040.
- Line 2b. Enter the amount from Part II, Line 4 of Schedule NJ-BUS-1 (Form NJ-1040).
- Line 3a. Enter the amount from Line 21 of Form NJ-1040.
- Line 3b. Enter the amount from Part III, Line 4 of Schedule NJ-BUS-1 (Form NJ-1040).
- Line 4a. Enter the amount from Line 22 of Form NJ-1040.
- Line 4b. Enter the amount from Part IV, Line 4 of Schedule NJ-BUS-1 (Form NJ-1040).
- Line 5b. Enter the amount from Line 12 of your 2014 Schedule NJ-BUS-2 (Form NJ-1040).
- Line 6a. Enter the total of Lines 1a through 4a.
- Line 6b. Enter the total of Lines 1b through 5b, netting gains with losses.
- Line 7. Enter the amount from Line 6a of this schedule.
- Line 8. Enter the amount from Line 6b of this schedule. If loss, enter zero here.
- Line 9. Subtract Line 8 from Line 7. If the result is zero, enter zero on Line 11 and continue with Line 12.
- Line 10. The adjustment percentage for tax year 2015 is 40% (0.40).
- Line 11. Multiply the amount on Line 9 by 40% (0.40). Enter here and Line 34 of Form NJ-1040.
- Line 12. If the amount on 6b is a loss, enter the amount of the loss on this line. Otherwise, enter zero.