# ALFRED \& MAURINE HAMILTON 2004 AMENDED 1040 

October 29, 2008
Alfred \& Maurine Hamilton
\#3556
9008 East Dr.
Austin, TX 78753-5112

## For Professional Services:

Prepare 2004 amended return
$\$ 250.00$

A carrying charge of $1 \frac{1}{2} \%$ per month shall be made after 30 days.

Davila, Buschhorn \& Associates, P.C. 7207 McNeil Dr.
Austin, Texas 78729-7610
512-258-6637 / 512-258-7699 Fax

October 29, 2008

Alfred \& Maurine P. Hamilton 9008 East Dr.
Austin, TX 78753-5112

Dear Alfred:
Enclosed is the decedent's 2004 amended return The return should be signed and dated, and mailed.

Specific filing instructions are as follows.
FEDERAL AMENDED INCOME TAX RETURN:
Mail your return as soon as possible.
Mail to - Internal Revenue Service Center Austin, TX 73301

No payment is required as you are due a refund in the amount of $\$ 15862$. (W,II be APplied to P13T Due TAKES)
Your copy of the return is enclosed for your files. We suggest that fou retain this copy indefinitely.
very truly fours,


Daniel DPvila III MPA, CPA, PFS, CRC

| Your first name and initial <br> ALFRED HAMILTON (DEC. 04/08/04) | Last name | Your social security number $458: 24617$ |
| :---: | :---: | :---: |
| If a joint return, spouse's first name and initial MAURINE P. HAMILTON (DEC. 10/06/06) | Last name | Spouse's social security number $459: 20: 259$ |
| Home address (no. and street) or P.O. box if mail is not delivered to your home 9008 EAST DR. | Apt. no. | Phone number $512-834-4309$ |
| City, town or post office, state, and ZIP code. <br> AUSTIN, TX 78753-5112 |  | For Paperwork Reduction Act Notice, see page 6. |

A If the name or address shown above is different from that shown on the original return, check here Notice, see page 6.

B Has the original return been changed or audited by the IRS or have you been notified that it will be?
C Filing status. Be sure to complete this line. Note. You cannot change from joint to separate returns after the due date.
On original return
On this return $\quad \square$ Single $\quad \mathrm{X}$ Married filing jointly $\quad \square$ Married filing separately $\quad \square$ Head of household $\quad \square$ Qualifying widow(er)

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

Use Part II on page 2 to explain any changes

## Income and Deductions (see pages 2-6)

1 Adjusted gross income (see page 3)
2 Itemized deductions or standard deduction (see page 3)
3 Subtract line 2 from line 1
4 Exemptions. If changing, fill in Parts I and II on page 2
5 Taxable income. Subtract line 4 from line 3
2 6 Tax (see page 4). Method used in col. C TRS
7 Credits (see page 4)
8 Subtract line 7 from line 6 . Enter the result but not less than zero
9 Other taxes (see page 4)
10) Total tax. Add lines 8 and 9

11 Federal income tax withheld and excess social security and tier 1
RRTA tax withheld. If changing, see page 4
12 Estimated tax payments, including amount applied from prior year's return
13 Earned income credit (EIC)
14 Additional child tax credit from Form 8812
15 Credits from Form 2439, Form 4136, or Form 8885
16 Amount paid with request for extension of time to file (see page 5)
17 Amount of tax paid with original return plus additionaPptax paid after it was filed
18 Total payments. Add lines 11 through 17 in column C
Refund or Amount You Owe
19 Overpayment, if any, as shown on originatreturn or as previously adjusted by the IRS
20 Subtract line 19 from line 18 (see page 55)
21 Amount you owe. If line 10 , columíc, is more than line 20 , enter the difference and see page 5
22. If line 10 , column $C$, is less than line, 20 , enter the difference

23 Amount of line 22 you want refúnded to you *APPIY TO PAST DUE TAXES * $\quad 15862$.
24 Amount of line 22 you want capplied to your
Sign Here
Joint return?
See page 2. See page 2. Kor your records.

Paid
Preparer's Use Only


Form 1040X (Rev. 11-2004)

Part I Exemptions. See Form 1040 or 1040A instructions. If you are not changing your exemptions, do not complete this part. If claiming more exemptions, complete lines 25-31. If claiming fewer exemptions, complete lines 25-30.

25 Yourself and spouse
Caution. If someone can claim you as a dependent, you cannot claim an
exemption for yourself.
26 Your dependent children who lived with you
27 Your dependent children who did not live with you due to divorce or separation
28 Other dependents
29 Total number of exemptions. Add lines 25 through 28
30 Multiply the number of exemptions claimed on line 29 by the amount listed below for the tax year you are amending. Enter the result here and on line 4.

| Tax <br> year | Exemption <br> amount | But see the instructions for line 4 on <br> page 3 if the amount on line 1 is over: |
| :---: | :---: | :---: |
|  | $\$ 3,100$ |  |
| 2004 | 3,50 | $\$ 107,025$ |
| 2003 | 3,000 | 104,625 |
| 2002 | 2,900 | 103,000 |
| 2001 |  | 99,725 |



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

| (a) First name Last name | (b) Dependent's social security number | (c) Dependent's relationship to you | $\begin{gathered} \text { (d) Chec } \\ \text { qualifying } \\ \text { for child tax } \end{gathered}$ | eck if 0 child ax credit | - lived with you $\qquad$ <br> - did not live with you due to divorce or separation |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | y |  |  |  |
|  | ! | r |  |  |  |
|  | ${ }^{\circ}$ |  |  |  | Dependents on 31 not entered above |
|  |  |  |  |  |  |
|  | 4 |  |  |  |  |
|  | - ब10 |  |  |  |  |

## Part II Explanation of Changes to Income, Deductions, and Credits

Enter the line number from page 1 for each item you are changing and give the reason for each change. Attach only the supporting forms and schedules for the items changed. If you do not attach the required information, your Form 1040X may be returned. Be sure to include your name and social security number on any attachments.
If the change relates to a net operating loss carryback or a general business credit carryback, attach the schedule or form that shows the year in which the loss or credit occurred. See page 2 of the instructions. Also, check here


TAXPAYERS RECEIVED AN IRA DISTRIBUTION FROM UNITED OF OMAHA ACCT. NO. UA7728312 FOR $\$ 60,006$. HOWEVER $\$ 56,444$ WAS ROLLED OVER WITHIN THE 60DAY GRACE PERIOD. SEE COPIES OF CHECK DATED 10/22/04 AND THE ROLLOVER DEPOSIT MADE ON 12/18/04.


Form 1040X (Rev. 11-2004)

PAYER:
FOR INQUIRIES CALL 1 ( 800 ) 646-7592 INSURANCE CONTRACTS, ETC.

UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA
OMAHA NE 68175

IDENTIFICATION NUMBERS:

| PAYER'S: | RECIPIENT'S: |
| :--- | :--- |
| 470322111 | $459-20-2593$ |

RECIPIENT:
hamilton maurine p
9008 EAST DR
AUSTIN
TX787535112




Untted of Omaha Life Inqurance Company
Mutual of Omaha Plaza
Ormha, NE 6E175
20
4023427600
mutualofomaha.com

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MAURINE P HAMILTON
9008 EAST DR
AUSTIN TX 78753-5112
```

| $\begin{aligned} & \text { CHECK NO } \\ & 0011443529 \\ & \hline \end{aligned}$ | $\begin{aligned} & \text { CHECK DATE } \\ & 10 / 22 / 2004 \end{aligned}$ | $\begin{aligned} & \text { PAYEE NO. } \\ & 0000000009 \\ & \hline \end{aligned}$ | $\begin{aligned} & \text { PA } \\ & \text { MAURINE P HAMILTON } \end{aligned}$ | $\sqrt{A M E}$ | $\begin{aligned} & \text { CHECK AMOUNT } \\ & \$ 56,444.06 \\ & \hline \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DESCRIPTION |  |  |  | VOUCHER | AMOUNT |
| AB7728312 |  | VE P HAMIL SURRENDER |  | 03217514 | 56,444.06 |

JPMORGAN CHASE BANK, N.A.
FORMERLY BANK ONE, NA (TX MKT)
P O BOX 961103, TX1-0030
FT WORTH, TX 76161-0103

#  <br> MAURINE P HAMILTON <br> 9008 EAST DR <br> AUSTIN TX 78753-5112 

Jan 1 through Dec 31, 2004

Page 1 of 3

FOR ACCOUNT INFORMATION, CALL 1-877-226-5663. TELEPHONE BANKERS ARE THERE TO SERVICE YOU DURING EXTENDED BUSINESS HOURS. FOR TEXT TELEPHONES (TDD/ṪTY), CALL 1-888-663-4833.
PARA ESPANOL, LLAME AL 1-888-BANKONE (888-226-5663).

Retirement Plan Summary

$\frac{\text { Investment number }}{0500000791381} \frac{\text { Maturity date }}{12-18-05} \frac{\text { Interest paid this year }}{}$| Value as of Dec. 31 |
| ---: | :--- |

Activity
Rollover contribution

## Traditional IRA Certificate

Investment number 0500000791381

| Balance as of December 17,2004 | $\$ .00$ |
| :--- | ---: |
| Balance as of Decembery 31, 2004 | $\$ 56,444.06$ |
| Term | 12 Months |
| Maturity date | $12-18-05$ |
| Interest earned but not yet paid | $\$ 40.71$ |
| Interest paid this year | $\$ .00$ |
| Current interest rate | $1.88 \%$ |


| Transactions on investment number $\mathbf{0 5 0 0 0 0 0 7 9 1 3 8 1}$ |  |  |  |
| :--- | :--- | ---: | ---: |
|  |  |  |  |
|  |  | Credits / | Debits / |
| Effective | Description | Deposits | Withdrawals |
| Date | Rollover deposit | $56,444.06$ |  |
| $12-18-04$ |  | $\$ 56,444.06$ | $\$ .00$ |


| Label |  |
| :---: | :---: |
| (See instructions on page 16.) | L <br>  <br>  <br> B <br> E |
| Use the IRS label. | L |
| Otherwise, please print or type. | H E R E |


| For the year Jan. 1-Dec. 31, 2004, or other tax year beginning | 2004, ending |  |
| :---: | :---: | :---: |
| Your first name and initial ALFRED | Last name (DEC. 04/08/04) HAMILTON |  |
| If a joint return, spouse's first name and initial MAURINE P. | Last name (DEC. 10/06/06) HAMILTON |  |
| Home address (number and street). If you have a P.O. box, see page 16. 9008 EAST DR. |  | Apt. no. |
| City, town or post office, state, and ZIP code. If you have a foreign address, see page 16. AUSTIN, TX 78753-5112 |  |  |

OMB No. 1545-0074
Label instructions Use the IRS label. Otherwise, or type.

| Election Campai |
| :--- |
| (See page 16.) |
| Filing Status |
| Check only <br> one box. <br> Exemptions |

If more than four
dependents, dependents,
see page 18.

## Income

Attach Form(s)
W-2 here. Also attach Forms
W-2G and 1099-R if tax was withheld.

If you did not get a W-2, see page 19.

Enclose, but do not attach, any payment. Also, please use Form 1040-V.

## Adjusted

Gross Income


Note. Checking "Yes" will not change your tax
Do you, or your spouse if filing a joint return, w
Single
Married filing jointly (even if only one had income)
Married filing separately. Enter spouse's SSN above and full name here.

| $\begin{aligned} & 1 \mathrm{X} \\ & \mathrm{~b} . \mathrm{X} \end{aligned}$ | Yourself. If someone can claim you as a dependent, do not check box 6a Spouse |  |  | $\begin{aligned} & 105 \\ & 6 \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| c Dependents: <br> (1) First name |  | Last name | (2) Dependent's social security number | (3) Dependent's relationshiy to you | $\begin{aligned} & \text { (4) in iqualify } \\ & \text { nop chilo of } \\ & \text { chid tax credit } \\ & \text { (see page 18) } \end{aligned}$ |
|  |  |  | $: \quad:$ | 5 |  |
|  |  |  | : | $\mathrm{D}^{4}$ |  |
|  |  |  | : : | $\stackrel{\text { ¢ }}{ }$ |  |
|  |  |  | : : | 40 |  |

$458: 24: 4617$
Spouse's social securtity mumber
$459: 20: 2593$ A Important!
You must enter yoursSN(s) above.

d

7 Wages, salaries, tips, etc. Attach Form(s) W-2

Adjusted
Gross
Income

## 410001 $11-03-04$

LHA For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 75.



ALFRED \& MAURINE P. HAMILTON
Caution: The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.
Part II Income or Loss From Partnerships and S Corporations Note. If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 6198. See page E-1.
27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unaliowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses?
 If you answered "Yes," see page E-6 before completing this section.


| Part III | Income or Loss From Estates and Trusts |
| :--- | :--- |



| Part IV | Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder |
| :--- | :--- | :--- |



## ALFRED \& MAURINE P. HAMILTON

- Attach to Form 1040 or Form 1040NR.


## Your social security number

$458: 244617$

## Part I Alternative Minimum Taxable Income

1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 40, and go to line 2. Otherwise, enter the amount from Form 1040, line 37, and go to line 7 . (If less than zero, enter as a negative amount.)

3 Taxes from Schedule A (Form 1040), line 9
4 Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet on page 2 of the instructions.
5 Miscellaneous deductions from Schedule A (Form 1040), line 26
6 If Form 1040, line 37, is over $\$ 142,700$ (over $\$ 71,350$ if married filing separately), enter the amount from line 9 of the Itemized Deductions Worksheet on page B-1 of the instructions for Schedules A \& B (Form 1040)
Tax refund from Form 1040, line 10 or line 21
Investment interest expense (difference between regular tax and AMT)
Depletion (difference between regular tax and AMT)
10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount
11 Interest from specified private activity bonds exempt from the regular tax
12
13 E
14
15
16

18 Passive activities (difference between AMT and regular tax income or loss)
19
20
21 Long-term contracts (difference between AMT and regular tax income)
22 Mining costs (difference between reguiar tax and AMT)
23 Research and experimental costs (difference between regular tax and AMT)
24 Income from certain installiment sales before January 1, 1987
25 Intangible drilling costs preference
26 Other adjustments, including income-based related adjustments
27 Alternative tax net operating loss deduction
28 Alternative minimum taxable income. Combine lines 1 through 27 . (If married filing separately and line 28 is more than $\$ 191,000$, see instructions)

| 1 |  |
| :--- | :--- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| 8 |  |
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| 21 |  |
| 22 |  |
| 23 |  |
| 24 |  |
| 25 |  |
| 26 |  |
| 27 |  |
| 28 |  |

## Part II Alternative Minimum Tax

29 Exemption. (If this form is for a child under age 14, see instructions.)

| IF your filing status is ... | AND line 28 is not over ... | THEN enter on line $29 .$. |
| :---: | :---: | :---: |
| Single or head of household | \$112,500 | \$40,250 |
| Married filing jointly or qualifying widow(er) | 150,000 | 58,000 |
| Married filing separately | .... 75,000 | .. 29,000 |

If line 28 is over the amount shown above for your filing status, see instructions.
30 Subtract line 29 from line $\mathbf{2 8}$. If zero or less, enter -0 - here and on lines 33 and 35 and stop here
31 - If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 55 here.

- All others: If line 30 is $\$ 175,000$ or less ( $\$ 87,500$ or less if married filing separately), multiply line 30 by $26 \%$ (.26). Otherwise, multiply line 30 by $28 \%(.28)$ and subtract $\$ 3,500$ ( $\$ 1,750$ if married filing separately) from the result.
32 Alternative minimum tax foreign tax credit (see instructions)
33 Tentative minimúm tax. Subtract line 32 from line 31
34 Tax from Form 1040, line 43 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 46). If you used Schedule $J$ to figure your tax, the amounts for lines 43 and 46 of Form 1040 must be refigured without using Schedule J (see instructions)

| 29 | 58000. |
| :---: | :---: |
| 30 | 71849. |
| 31 | 18681. |
| $32$ |  |
| 33 | 18681. |
| 34 | 21274. |
| 35 | 0. |

35 Alternative minimum tax. Subtract line 34 from line 33 . If zero or less, enter -0 . Enter here and on Form 1040, line 44



Part I Gross Farm Rental Income - Based on Production. Include amounts converted to cash or the equivalenf,

| 1 | Income from production of livestock, produce, grains, and other crops |  | 1 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 2a | Cooperative distributions (Form(s) 1099-PATR) ............................. 2a $^{\text {a }}$ | 2a $\$ 2b Taxable amount & 2 b &  \hline 3 a & Agricultural program payments ................................................ 3a $^{\text {a }}$ | 3a 3b Taxable amount | 3b |  |
| a | Commodity Credit Corporation (CCC) Ioans: <br> CCC loans reported under election |  | 4a |  |  |
| b | CCC loans forfeited .......................................................... 4 4b | b $\longrightarrow 4 \mathrm{c}$ taxable amount | 4 c |  |  |
| 5 | Crop insurance proceeds and certain disaster payments: |  |  |  |  |
| a |  |  | 5b |  |  |
| c |  |  | 5d |  |  |
| 6 | Other income, including Federal and state gasoline or fuel tax credit or refund ................SEE STATEMENT 6 |  | 6 | 570. |  |
| 7 | Gross farm rental income. Add amounts in the right column for lines 1 through 6 . Enter the total here and on Schedule E (Form 1040), line 42 |  | 7 | 570. |  |

Part II Expenses - Farm Rental Property. Do not include personal or living exponses.


ALFRED \& MAURINE P. HAMILTON
Rental Real Estate Activities With Active Participation (For the definition of active participation see
Special Allowance for Rental Real Estate Activities on page 3 of the instructions.)


If line 4 is a loss and: - Line 1d is a loss, go to Part II.

- Line 2 c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
- Line 3 d is a loss (and lines 1 d and 2 C are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and youfived with your spouse at any time during the year, do not complete
Part II or Part III. Instead, go to line 15.
Part II Special Allowance for Rental Real Estate With Active Participation Note: Enter all numbers in Part II as positive amounts. See page 8 for an example.
 If line 2 c is a loss, go to Part III. Otherwise, go to line 15.

## Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter allnumbers in Part III as positive amounts. See the example for Part II on page 8.

| 11 | Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions | 11 |  |
| :---: | :---: | :---: | :---: |
| 12 | Enter the loss from line 4 | 12 |  |
|  | Reduce line 12 by the amount on line 10 | 13 |  |
| 14 | Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13 | 14 |  |

14 Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13
14

## Part IV Total Losses Allowed

15 Add the income, if any, on lines $1 a$ and $3 a$ and enter the total
16 Total losses allowed from all passive activities for 2004. Add lines 10,14 , and 15 . See the instructions to find out how to report the losses on your tax return

Worksheet 1 - For Form 8582, Lines 1a, 1b, and 1 c (See instructions.)

| Name of activity | Current year |  | Prior years <br> (c) Unallowed loss (line 1c) | Overall gain or loss |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | (a) Net income (line 1a) | (b) Net loss (line 1b) |  | (d) Gain | (e) Loss |
|  |  |  |  |  |  |
|  |  |  |  |  | F |
|  |  |  |  |  | 68 |
|  |  |  |  |  |  |
|  | SEE ATTACHED STATEMENT FOR WORKSHEET 1 |  |  |  |  |
| Total. Enter on Form 8582, lines 1a, 1b, and 1c |  | -854. |  |  |  |

## Worksheet 2 - For Form 8582, Lines 2a and 2b (See instructions.)

| Name of activity | (a) Current year <br> deductions (line 2a) | (b) Prior year <br> unallowed deductions (line 2b) |
| :--- | :--- | :--- |
|  |  |  |
|  |  |  |
|  |  |  | and $2 b$

Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

| Name of activity | Current year |  | Prior years <br> (c) Unallowed loss (line 3c) | Overall gain or loss |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | (a) Net income (line 3a) | (b) Net loss (line 3b) |  | (d) Gain | (e) Loss |
|  |  | \% |  |  |  |
|  |  | A |  |  |  |
|  |  | \% |  |  |  |
|  |  | A |  |  |  |
|  |  |  |  |  |  |
| Total. Enter on Form 8582, lines 3a, <br> 3b, and 3c |  |  |  |  |  |

## 3b, and 3c

Worksheet 4 - Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

| Name of activity | Form or schedule and line number to be reported on (see instructions) | (a) Loss | (b) Ratio | (c) Special allowance | (d) Subtract column (c) from column (a) |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | ® |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  | SEE ATTACHED STATEMENT FOR WORKSHEET 4 |  |  |  |  |
| Total . |  | 85 | . 0000000 | 85 | 0. |

Worksheet 5 - Allocation of Unallowed Losses (See instructions.)

| Worksheet 5-Allocation of Unallowed Losses (See instructions.) |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- |
| Name of activity | Form or schedule <br> and line number <br> to be reported on <br> (see instructions) | (a) Loss | (b) Ratio | (c) Unallowed loss |



Worksheet 7 - Activities With Losses Reported on Two or More Different Forms or Schedules (See instructions.)


1805.

ST. OF TEXAS DEFERRED COMP.
AMOUNT RECEIVED THIS YEAR 4117. NONTAXABLE AMOUNT CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D

## EMPLOYEES RETIREMENT SYSTEM OF TEXAS

AMOUNT RECEIVED THIS YEAR<br>NONTAXABLE AMOUNT<br>CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D

## US MILITARY RETIREMENT PAY

AMOUNT RECEIVED THIS YEAR
NONTAXABLE AMOUNT
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D

4117.

5000 .
819.
24125.

3722 .
7481.

## UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR
NONTAXABLE AMOUNT
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D
TOTAL INCLUDED IN FORM 1040, LINE 16B


CHECK ONLY ONE BOX:
A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING WIDOW(ER)

X B. MARRIED FILING JOINTLY
C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE AT ANY TIME DURING 2004
D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE FOR ALL OF 2004

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR

FORMS SSA-1099 AND RRB-1099. . . . . . . . . . . . . . . . a 25901.
2. ENTER ONE HALF OF LINE 1. . . . . . . . . . . . . . . . . 12951.
3. ADD THE AMOUNTS ON FORM 1040, LINE 7, 8B, 9A, 10 THRU 12, 13, 14, 15B, 16B, 17 THRU 19, 21 AND SCHEDULE B, LINE 2. DO NOT INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR RRB-1099 106979.
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS, OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF PUERTO RICO THAT YOU CLAIMED
5. ADD LINES 2, 3, AND 4. . . . . . . . . . . . . . . . . . 119930 .
6. ADD THE AMOUNTS ON FORM 1040, LINES 23 THRU 25 AND 28 THRU 34A, AND ANY AMOUNT YOU ENTERED ON THE DOTTED LINE NEXT TO LINE 35. 0.
7. SUBTRACT LINE 6 FROM LINE 5 . . . . . . . . . . . . . . 119930 .
8. ENTER: $\$ 25,000$ IF YOU CHECKED BOX A OR D OR $\$ 32,000$ IF YOU CHECKED BOX B, OR $\$-0-\quad$ IF YOU CHECKED BOX C. . . . . . . . . . 32000 .
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7? [ ] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE TAXABLE. YOU DO NOT HAVE TO ENTER ANY AMOUNTS ON LINES 20A OR 20B OF FORM 1040. BUT IF YOU ARE MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR SPOUSE FOR ALL OF 2004, ENTER -O- ON LINE 20B. BE SURE YOU ENTERED 'D' TO THE LEFT OF LINE 20A.
[X] YES. SUBTRACT LINE 8 FROM LINE 7 . . . . . . . . . . . 87930.
10. ENTER $\$ 9,000$ IF YOU CHECKED BOX A OR D, $\$ 12,000$ IF YOU CHECKED BOX B \$-0- IF YOU CHECKED BOX C . . . . . . . . . . . . 12000.
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0-. 75930.
12. ENTER THE SMALLER OF LINE 9 OR LINE 10 . . . . . . . . . . 12000 .
13. ENTER ONE HALF OF LINE 12. . . . . . . . . . . . . . . . . 6000 .
14. ENTER THE SMALLER OF LINE 2 OR LINE 13 . . . . . . . . . . 6000 .
15. MULTIPLY LINE 11 BY $85 \%$ (.85). IF LINE 11 IS ZERO, ENTER -0- 64541.
16. ADD LINES 14 AND 15.
70541.
17. MULTIPLY LINE 1 BY-85\% (.85) . . . . . . . . . . . . . . . 22016
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17
22016. * ENTER THE AMOUNT FROM LINE 1 ABOVE ON FORM 1040, LINE 20A $=$ * ENTER THE AMOUNT FROM LINE 18 ABOVE ON FORM 1040, LINE 20B





FORM 8582 LOSSES FROM ACTIVE RENTAL OF REAL ESTATE-WORKSHEET $4($ STATEMENT 8



PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME
TOTAL TO FORM 8582, LINE 16


INTERNAL REVENUE SERVICE AUSTIN, TX 73301-0002


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