	Alfred and Maure	en Hamilton Estate	e income and taxes	s spreadsheet				
	(according to Danny				Danny Davila's erro	rs are in red - IMHO.		
		· ·	-					
Income								
				Alfred died 4-8-04	proposed		Maureen died 10-6-06	Estate earnings
	2001	2002	2003	2004 filed	2004 amended	2005	2006	2007
income total (SS +								
interest income)				\$28344	\$28344	\$30520.4	\$25834	
non-taxable								
interest income?								
income from								
Annuities?	It's advertised as a	guaranteed monthly	income until you die	 so what was the m 	onthly annuity incom	ne, and why wasn't it	in the taxes, for the first	9 months of 2004?
income from								
pensions? air force								
retirement benefits								
- \$5000 per month								
Alan said			house sold in 2003					
_								
Taxes	(standard deduction	used by Danny Dav	rila in 2004, 2005 and					
a. .				filed by Sylvia in			r review by Alan and	
Status				Sept 2008	Marjie - received 3-			
Tax Preparer				Danny Davila	Danny Davila	Danny Davila	Danny Davila	
			2003 Unknown -					
taxable interest			Requested from	00.440	00.440	07 040	#0.040	
income			Danny	\$2,443	\$2,443	· ·	\$6,219	
social security				\$25,901	\$25,901	\$0	\$19,615	
2005 SS benefits						000 040 40		
reciept in folder				000.040	000.040	\$22,610.40	Φ.0.	
SS taxable amt				\$22,016	\$22,016	\$0	\$0	
total AGI (adjusted				¢406.000	¢400.00E	¢ E 420	¢4.500	
gross income)				\$186,293	\$128,995		\$4,598	
tax due			overpaid	\$37,136			\$0	
tax penalties			\$0	\$12000	\$12000		***	
tax paid				\$4538	\$4538		\$30	
refund brought				¢40.740	¢40.740			
forward				\$16,716	\$16,716			
total tax payments				\$21,254	\$21254			
apparent owed								
taxes (not including								
penalties)					\$20			
Danny Davila's					ΨΖΟ			
amended 2004								
"payments made"								
??? by who?					\$15,882			
11/3/08 IRS letter					ψ.13,302			
to Sylvia - payment								
made - ???					\$4,000			
tax refund (applied					Ţ.,300			
to taxes due)			\$16,716		\$15,862		\$30	
tax owed				\$16336			·	
				Ψ.5566				

2004 amonded toy								
2004 amended tax								
refund - appears to								
have added								
\$15862 as \$15882								
twice in amended								
return - on line 10,								
column B and on								
line 17, coming up								
with an erroneous								
refund of \$15,862								
as a result, unless								
Sylvia "paid the								
taxes"					\$15862			
Additional Notes	and Concerns:							
				ving forms: 1) Form 468	4, Casualty and The	efts, 2) Form 4972, T	ax on Lump-Sum D	istributions, and 3)
Schedule K-1. Bene	eficary's share of inc	ome, deductions,cr	redits,etc.					
0.41 1 1 1 1 1			"		2005 40: 5		0004	W 00046 0005 ::
				the Farm, in 2004 and 2	2005. \$0 in Farm Ma	intenance entered f	or 2004 and 2006, v	vith \$824 for 2005. Alar
said he gave Sylvia	receipts for Farm M	laintenance in 2004	1.					
		40 700 04000 007	00 1 601 101	and the product of the comment of th	a ic recognible for t	hese penalties, as s	he has refused to h	and estate records ove
						he needs to settle t		
to Alan since 2004,	including the manda	atory annual report,		en him all the accounting		he needs to settle t		
to Alan since 2004,		atory annual report,				he needs to settle t		
to Alan since 2004, \$12,000 to an attor	including the manda ney for over 7 month	atory annual report, is to get them.	, and still has not giv	ven him all the accountir	ng and bank records		he estate, to this da	y still, after paying
to Alan since 2004, \$12,000 to an attor 4. What is the \$350	including the manda ney for over 7 month for Professional Se	atory annual report, is to get them. rvice in the Farm S	, and still has not give ection? It doesn't or		ng and bank records		he estate, to this da	y still, after paying
to Alan since 2004, \$12,000 to an attor 4. What is the \$350	including the manda ney for over 7 month	atory annual report, is to get them. rvice in the Farm S	, and still has not give ection? It doesn't or	ven him all the accountir	ng and bank records		he estate, to this da	y still, after paying
to Alan since 2004, \$12,000 to an attor 4. What is the \$350 have not received it	including the manda ney for over 7 month for Professional Se , even to deduct it fr	atory annual report, as to get them. rvice in the Farm S om the \$2004 taxe	and still has not give control of the control of th	ven him all the accounting cour in 2005 and 2006. V	ng and bank records We have repeatedly	asked you for your 2	he estate, to this da	y still, after paying the Annuities and still
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prior balance -10- 21-09	\$1,010.00	
prepare 2006		
return	\$590.00	
2006 return +		
conversations =		
\$840, (\$840 -\$590		
= \$250 for		
conversations -		
see bill)	\$250.00	
total due 10-21-08	\$1,600.00	
total requested in		
December	\$2,072.00	
total due in		
January after		
receiving bill finally		
- includes charges		
for 2007 taxes -		
Sylvia's?	\$1,850.00	
interest on Danny's		
bill - 1.5% per		
month after 30		
days (as of		
11/30/08)	\$43.64	
1/31/09 bill in 2006		
folder received on		
3/16/09 - says new		
balance different		
from what we		
received in the		
mail.	\$1,922.59	
1/31/09 addition to		
Danny Davila bill		
for overdue		
balance - 1.5% per		
month	\$29.39	
Sylvia's bill from		
Danny Davila -		
2004-2007 - paid		
by Sylvia	\$1,631.25	

prior payments to Danny Davila - 8-			
28-08	\$1,000.00		