

Form  
**1040EZ**

**Income Tax Return for Single and  
Joint Filers With No Dependents** (99)

**2017**

OMB No. 1545-0074

|  |                               |   |
|--|-------------------------------|---|
| Your first name and initial<br><b>Robert A</b>   | Last name<br><b>Woolard</b>   | Your social security number<br>[REDACTED]   |
| If a joint return, spouse's first name and initial   | Last name                     | Spouse's social security number   |
| Home address (number and street). If you have a P.O. box, see instructions.<br>[REDACTED]  |                               | Apt. no.  |
| City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).<br><b>Battle Creek, IA 51006</b> |                               | <b>Presidential Election Campaign</b><br>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.<br><input type="checkbox"/> You <input type="checkbox"/> Spouse |
| Foreign country name   | Foreign province/state/county |   |

|   |          |  |          |              |           |
|---|----------|--|----------|--------------|-----------|
| <b>Income</b><br><br>Attach Form(s) W-2 here.<br><br>Enclose, but do not attach, any payment. | <b>1</b> | Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2.   | <b>1</b> | <b>0</b>     | <b>00</b> |
|   | <b>2</b> | Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.  | <b>2</b> | <b>0</b>     | <b>00</b> |
|   | <b>3</b> | Unemployment compensation and Alaska Permanent Fund dividends (see instructions).  | <b>3</b> | <b>0</b>     | <b>00</b> |
|   | <b>4</b> | Add lines 1, 2, and 3. This is your <b>adjusted gross income</b> .   | <b>4</b> | <b>0</b>     | <b>00</b> |
|   | <b>5</b> | If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on back.<br><input type="checkbox"/> You <input type="checkbox"/> Spouse<br>If no one can claim you (or your spouse if a joint return), enter \$10,400 if <b>single</b> ; \$20,800 if <b>married filing jointly</b> . See back for explanation. | <b>5</b> | <b>10400</b> | <b>00</b> |
|   | <b>6</b> | Subtract line 5 from line 4. If line 5 is larger than line 4, enter -0-.<br>This is your <b>taxable income</b> .   | <b>6</b> | <b>0</b>     | <b>00</b> |

|                                   |           |   |           |             |           |  |
|-----------------------------------|-----------|---|-----------|-------------|-----------|--|
| <b>Payments, Credits, and Tax</b> | <b>7</b>  | Federal income tax withheld from Form(s) W-2 and 1099.  | <b>7</b>  | <b>2285</b> | <b>60</b> |  |
|                                   | <b>8a</b> | Earned income credit (EIC) (see instructions)   | <b>8a</b> | <b>0</b>    | <b>00</b> |  |
|                                   | <b>b</b>  | Nontaxable combat pay election. <span style="float: right;">8b</span>   |           |             |           |  |
|                                   | <b>9</b>  | Add lines 7 and 8a. These are your <b>total payments and credits</b> .  | <b>9</b>  | <b>2285</b> | <b>60</b> |  |
|                                   | <b>10</b> | Tax. Use the amount on line 6 above to find your tax in the tax table in the instructions. Then, enter the tax from the table on this line. | <b>10</b> | <b>0</b>    | <b>00</b> |  |

|  |            |   |            |  |           |
|--|------------|---|------------|--|-----------|
| <b>Refund</b><br><br>Have it directly deposited! See instructions and fill in 13b, 13c, and 13d, or Form 8888. | <b>11</b>  | Health care: individual responsibility (see instructions) Full-year coverage <input checked="" type="checkbox"/>  | <b>11</b>  |  |           |
|  | <b>12</b>  | Add lines 10 and 11. This is your <b>total tax</b> .  | <b>12</b>  | <b>0</b>   | <b>00</b> |
|  | <b>13a</b> | If line 9 is larger than line 12, subtract line 12 from line 9. This is your <b>refund</b> .<br>If Form 8888 is attached, check here <input type="checkbox"/> | <b>13a</b> | <b>2285</b>  | <b>60</b> |
|  | <b>b</b>   | Routing number <input type="text"/>   | <b>c</b>   | Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings |           |

|                       |           |  |           |  |  |
|-----------------------|-----------|--|-----------|--|--|
| <b>Amount You Owe</b> | <b>14</b> | If line 12 is larger than line 9, subtract line 9 from line 12. This is the <b>amount you owe</b> . For details on how to pay, see instructions. | <b>14</b> |  |  |
|-----------------------|-----------|--|-----------|--|--|

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

|                      |                      |                                      |
|----------------------|----------------------|--------------------------------------|
| Designee's name      | Phone no.            | Personal identification number (PIN) |
| <input type="text"/> | <input type="text"/> | <input type="text"/>                 |

**Sign Here**  
Under penalties of perjury, I declare that I have examined this return and, to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

|   |      |                     |  |
|---|------|---------------------|--|
| Your signature  | Date | Your occupation     | Daytime phone number   |
| Spouse's signature. If a joint return, <b>both</b> must sign. | Date | Spouse's occupation | If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/> |

**Paid Preparer Use Only**

|                            |                      |      |   |      |
|----------------------------|----------------------|------|---|------|
| Print/Type preparer's name | Preparer's signature | Date | Check <input type="checkbox"/> if self-employed | PTIN |
| Firm's name                | Firm's EIN           |      |   |      |
| Firm's address             | Phone no.            |      |   |      |

**Substitute for Form W-2, Wage and Tax Statement, or  
Form 1099-R, Distributions From Pensions, Annuities, Retirement  
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.  
▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

**1** Name(s) shown on return **2** Your social security number  
Robert Woolard

**3** Address  
Battle Creek, IA 51006

**4** Enter year in space provided and check one box. For the tax year ending December 31, 2017,  
I have been unable to obtain (or have received an incorrect)  Form W-2 OR  Form 1099-R.  
I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

**5** Employer's or payer's name, address, and ZIP code **6** Employer's or payer's identification number (if known)

**7 Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

|  |               |                                       |               |
|--|---------------|---------------------------------------|---------------|
| <b>a</b> Wages, tips, and other compensation | <u>0</u>      | <b>f</b> State income tax withheld    | <u>252.99</u> |
| <b>b</b> Social security wages               | <u>0</u>      | (Name of state) <u>Nebraska</u>       |               |
| <b>c</b> Medicare wages and tips             | <u>0</u>      | <b>g</b> Local income tax withheld    | <u>0</u>      |
| <b>d</b> Social security tips                | <u>13.19</u>  | (Name of locality)                    |               |
| <b>e</b> Federal income tax withheld         | <u>805.00</u> | <b>h</b> Social security tax withheld | <u>683.11</u> |
|  |               | <b>i</b> Medicare tax withheld        | <u>159.76</u> |

**8 Form 1099-R.** Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

|   |                             |                                      |                             |
|---|-----------------------------|--------------------------------------|-----------------------------|
| <b>a</b> Gross distribution                 | <u>                    </u> | <b>f</b> Federal income tax withheld | <u>                    </u> |
| <b>b</b> Taxable amount                     | <u>                    </u> | <b>g</b> State income tax withheld   | <u>                    </u> |
| <b>c</b> Taxable amount not determined      | <input type="checkbox"/>    | <b>h</b> Local income tax withheld   | <u>                    </u> |
| <b>d</b> Total distribution                 | <input type="checkbox"/>    | <b>i</b> Employee contributions      | <u>                    </u> |
| <b>e</b> Capital gain (included in line 8b) | <u>                    </u> | <b>j</b> Distribution codes          | <u>                    </u> |

**9** How did you determine the amounts on lines 7 and 8 above?

**Company provided W-2 which erroneously alleged payments of IRC sections 3401(a) and 3121(a) "wages".**

**10** Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

**None. Company issued W-2 before "wage" errors were noted. The amounts they identified as withheld are correct. however.**

**General Instructions**

Section references are to the Internal Revenue Code.

**Future developments.** Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be available at [www.irs.gov/Form4852](http://www.irs.gov/Form4852).

**Purpose of form.** Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

**Note:** Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use your Social Security online account to verify wages reported by your employers. Please visit [www.SSA.gov/myaccount](http://www.SSA.gov/myaccount). Or, you may contact your local SSA office to verify wages reported by your employer.

**Will I need to amend my return?** If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.

**Penalties.** The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include:

**Substitute for Form W-2, Wage and Tax Statement, or  
Form 1099-R, Distributions From Pensions, Annuities, Retirement  
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

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**7 Form W-2.** Enter wages, tips, other compensation, and taxes withheld.

|  |               |                                       |               |
|--|---------------|---------------------------------------|---------------|
| <b>a</b> Wages, tips, and other compensation | <u>0</u>      | <b>f</b> State income tax withheld    | <u>0</u>      |
| <b>b</b> Social security wages               | <u>0</u>      | (Name of state) <u>Iowa</u>           |               |
| <b>c</b> Medicare wages and tips             | <u>0</u>      | <b>g</b> Local income tax withheld    | <u>0</u>      |
| <b>d</b> Social security tips                | <u>0</u>      | (Name of locality)                    |               |
| <b>e</b> Federal income tax withheld         | <u>295.60</u> | <b>h</b> Social security tax withheld | <u>277.28</u> |
|  |               | <b>i</b> Medicare tax withheld        | <u>64.85</u>  |

**8 Form 1099-R.** Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

|   |                             |                                      |                             |
|---|-----------------------------|--------------------------------------|-----------------------------|
| <b>a</b> Gross distribution                 | <u>                    </u> | <b>f</b> Federal income tax withheld | <u>                    </u> |
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