

Form 1040EZ

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

2015

OMB No. 1545-0074

Personal information section including name, address, and social security numbers.

Income section with lines 1-6 detailing wages, interest, and adjusted gross income.

Payments, Credits, and Tax section with lines 7-12 detailing tax withholdings and total tax.

Refund section with line 13a and routing/account numbers for direct deposit.

Amount You Owe section with line 14.

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

Sign Here section with signature lines for taxpayer and spouse, and occupation fields.

Paid Preparer Use Only section with fields for preparer name, signature, date, and firm information.

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.

Department of the Treasury
Internal Revenue Service

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

▶ Information about Form 4852 is available at www.irs.gov/form4852.

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

John T and Ha [REDACTED] [REDACTED]

3 Address

[REDACTED] East Wenatchee, WA 98802

4 Enter year in space provided and check one box. For the tax year ending December 31, 2015,
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)

[REDACTED] 27- [REDACTED]

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

a Wages, tips, and other compensation	0	f State income tax withheld	0
b Social security wages	0	(Name of state)	
c Medicare wages and tips	0	g Local income tax withheld	0
d Social security tips	0	(Name of locality)	
e Federal income tax withheld	26.00	h Social security tax withheld	69.00
		i Medicare tax withheld	16.00

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

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

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

Company provided records and the statutory language behind IRC sections 3401 and 3121 and others.

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

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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1 Name(s) shown on return **2** Your social security number
John T and Ha [REDACTED] [REDACTED]

3 Address
 [REDACTED] **East Wenatchee, WA. 98802**

4 Enter year in space provided and check one box. For the tax year ending December 31, 2015,
 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)
 [REDACTED] [REDACTED]

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

a Wages, tips, and other compensation	_____	f State income tax withheld	_____
b Social security wages	_____	(Name of state)	_____
c Medicare wages and tips	_____	g Local income tax withheld	_____
d Social security tips	_____	(Name of locality)	_____
e Federal income tax withheld	_____	h Social security tax withheld	_____
		i Medicare tax withheld	_____

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

a Gross distribution	_____	131,628	f Federal income tax withheld	_____	23,119
b Taxable amount	_____	0	g State income tax withheld	_____	
c Taxable amount not determined	<input checked="" type="checkbox"/>		h Local income tax withheld	_____	
d Total distribution	<input type="checkbox"/>		i Employee contributions	_____	
e Capital gain (included in line 8b)	_____		j Distribution codes	_____	7

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

I was provided a 1099-R which erroneously alleged payments of IRC Section 3121 and 3401 wages which are hereby disputed. The deduction appears accurate.

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

None. It is not my responsibility to seek corrected form, only to submit a corrected form as I understand the law.

The careful reader will note a \$137 discrepancy in the amounts reported on John and Ha's 4852s, their 1040, and the amount refunded to them as an overpayment. Presumably someone simply transposed numbers inaccurately...