

Form **1040-X**

Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**

OMB No. 1545-0074

(Rev. July 2021)

Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information.

This return is for calendar year (enter year) **2020** or fiscal year (enter month and year ended)

Your first name and middle initial  
**Jodie A.** Last name  
**Marion** Your social security number  
XXXXXXXXXX

If joint return, spouse's first name and middle initial Last name Spouse's social security number

Current home address (number and street). If you have a P.O. box, see instructions Apt. no. Your phone number

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below. See instructions  
**Norwich CT 06360**

Foreign country name Foreign province/state/country Foreign postal code

Amended return filing status. You must check one box even if you are not changing your filing status. Caution: In general, you can't change your filing status from married filing jointly to married filing separately after the return due date.

Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Enter on lines 1 through 23, columns A through C, the amounts for the return year entered above.

Use Part III on page 2 to explain any changes.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount
<b>Income and Deductions</b>			
1 Adjusted gross income. If a net operating loss (NOL) carryback is included, check here ▶ <input type="checkbox"/>	1 40891	(40891)	0
2 Itemized deductions or standard deduction	2 18559	0	18559
3 Subtract line 2 from line 1	3 22331	(22331)	0
4a Reserved for future use	4a		
b Qualified business income deduction	4b 0	0	0
5 Taxable income. Subtract line 4b from line 3. If the result is zero or less, enter -0-	5 22331	(22331)	0
<b>Tax Liability</b>			
6 Tax. Enter method(s) used to figure tax (see instructions): IRS TAX TABLES	6 2361	(2361)	0
7 Nonrefundable credits. If a general business credit carryback is included, check here ▶ <input type="checkbox"/>	7 700	(700)	0
8 Subtract line 7 from line 6. If the result is zero or less, enter -0-	8 1661	(1661)	0
9 Reserved for future use	9		
10 Other taxes	10 0	0	0
11 Total tax. Add lines 8 and 10	11 1661	(1661)	0
<b>Payments</b>			
12 Federal income tax withheld and excess social security and tier 1 RRSA tax withheld. (If changing, see instructions.)	12 2777	3322	6099
13 Estimated tax payments, including amount applied from prior year's return	13 0	0	0
14 Earned income credit (EIC)	14 173	(173)	0
15 Refundable credits from: <input type="checkbox"/> Schedule 5812 Form(s) <input type="checkbox"/> 2439 <input type="checkbox"/> 4136 <input type="checkbox"/> 8863 <input type="checkbox"/> 8885 <input type="checkbox"/> 8962 or <input type="checkbox"/> other (specify):	15 0	0	0
16 Total amount paid with request for extension of time to file, tax paid with original return, and additional tax paid after return was filed	16 0	0	0
17 Total payments. Add lines 12 through 15, column C, and line 16	17 0	0	6099
<b>Refund or Amount You Owe</b>			
18 Overpayment, if any, as shown on original return or as previously adjusted by the IRS	18 0	1389	1389
19 Subtract line 18 from line 17. (If less than zero, see instructions.)	19 0	4610	4610
20 Amount you owe. If line 11, column C, is more than line 19, enter the difference	20 0	0	0
21 If line 11, column C, is less than line 19, enter the difference. This is the amount overpaid on this return	21 0	4610	4610
22 Amount of line 21 you want refunded to you	22 0	4610	4610
23 Amount of line 21 you want applied to your (enter year): estimated tax   23	23		

For Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 11360L

Complete and sign this form on page 2.

Form 1040-X (Rev. 7-2021)

Part 2 Dependents		A. Original number of dependents reported or as previously adjusted	B. Net change - amount of increase or (decrease)	C. Correct number
24	Reserved for future use	24		
25	Your dependent children who lived with you	25	1	1
26	Your dependent children who didn't live with you due to divorce or separation	26	0	0
27	Other dependents	27	0	0
28	Reserved for future use	28		
29	Reserved for future use	29		
30	List ALL dependents (children and others) claimed on this amended return.			

Dependents (see instructions):	(a) First name	Last name	(b) Social security number	(c) Relationship to you	(d) <input checked="" type="checkbox"/> if qualifies for (see instructions):	
					Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

**Part 3 Presidential Election Campaign Fund (for the return year entered at the top of page 1)**

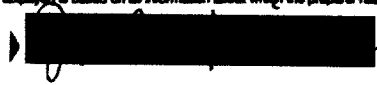
Checking below won't increase your tax or reduce your refund.  
 Check here if you didn't previously want \$3 to go to the fund, but now do.  
 Check here if this is a joint return and your spouse did not previously want \$3 to go to the fund, but now does.

**Part 4 Explanation of Changes.** In the space provided below, tell us why you are filing Form 1040-X.  
 ▶ Attach any supporting documents and new or changed forms and schedules.

The data provided by the payers on my 2020 W-2 and 1099-INT was erroneous as I did not receive taxable wages or interest as defined in IRC Title 26 USC Sections 3401(a) and 3121(a); therefore I have corrected my adjusted gross income to 30, which changed the amounts on lines 1, 3, 5, and 8. I am not claiming any credits so this has changed lines 7, 8, 11, and 14. Line 12, Federal income tax withheld has been corrected to include federal income tax of \$2777, SS tax \$2882 and Medicare tax \$430. A total of \$3689 was incorrectly withheld from my paycheck so I have included form 4852 and 1099-INT with the correct data. My corrected overpayment total for tax year 2020 is \$6888, therefore I am due an additional refund of \$4810. Thank you for your attention to this matter.

**Sign Here**

Remember to keep a copy of this form for your records.  
 Under penalties of perjury, I declare that I have filed an original return, and that I have examined this amended return, including accompanying schedules and statements, and to the best of my knowledge and belief, this amended return is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information about which the preparer has any knowledge.

 \_\_\_\_\_ 3/20/23 \_\_\_\_\_ Administrative  
 Date Your occupation

Spouse's signature, if a joint return, both must sign. \_\_\_\_\_ Date \_\_\_\_\_ Spouse's occupation \_\_\_\_\_

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

Form **4852**  
(Rev. September 2020)

**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.**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-X.

Attachment  
Sequence No. 04

▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

**You must take the following steps before filing Form 4852**

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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 to file with your return.

1 Name(s) shown on return  
Julie A. Marston

2 Your social security number  
[REDACTED]

3 Address  
[REDACTED] Norwich CT 06360

*I hereby  
Notify*

4 Enter year in space provided and check one box. For the tax year ending December 31, 2020  
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  
The William W Backus Hospital  
380 John Downey Drive  
New Britain CT 06051

6 Employer's or payer's TIN (if known)  
00-0250773

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

a Wages, tips, and other compensation	0	f State income tax withheld	1416.60
b Social security wages	0	(Name of state) Connecticut	
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	2777.34	h Social security tax withheld	2692.14
		i Medicare tax withheld	625.51

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or 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"/>	(Name of state)	
d Total distribution	<input type="checkbox"/>	h Local income tax withheld	
e Capital gain (included on line 8b)		(Name of locality)	
		i Employee contributions	
		j Distribution codes	

9 How did you determine the amounts on lines 7 and 8 above?  
Lines 7 a, b & c are corrected to zero because I did not receive wages as defined in IRC Title 26 USC Sections 3401(a) and 3121(a).  
Lines 7 e, f, h, & i were provided by the payer listed in section 5 above.

10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.  
NONE

**General instructions**

Section references are to the Internal Revenue Code.

Future developments. For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [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 (original or corrected) 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 (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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.

For Paperwork Reduction Act Notice, see page 2.

Cat. No. 48069U

Form 4852 (Rev. 9-2020)

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. <b>CHARTER OAK FEDERAL CREDIT UNION 1085 HARTFORD TPKE WATERFORD CT 06385</b>  (800) 446-8985		Payer's RTN (optional)	OMB No 1545-0112 <b>2020</b> Form <b>1099-INT</b>		<b>Interest Income</b>							
PAYER'S TIN <b>06-0659509</b>		1 Interest income <b>\$ 0.00</b>		<b>Copy B</b> <b>For Recipient</b>								
RECIPIENT'S TIN <b>XX-XXXXXX</b>		2 Early withdrawal penalty <b>\$0.00</b>			This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.							
RECIPIENT'S name, street address, city or town, state or province, country, and ZIP or foreign postal code <b>FRIEYER JULIE M NORWICH CT 06360</b>		3 Interest on U.S. Savings Bonds and Treas. obligations <b>\$0.00</b>		This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.								
4 Federal income tax withheld <b>\$0.00</b>		5 Investment expenses <b>\$</b>				This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.						
6 Foreign tax paid <b>\$</b>		7 Foreign country or U.S. possession					This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.					
8 Tax-exempt interest <b>\$</b>		9 Specified private activity bond interest <b>\$</b>						This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.				
10 Market discount <b>\$</b>		11 Bond premium <b>\$</b>							This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.			
FATCA filing requirement <input type="checkbox"/>		12 Bond premium on Treasury obligations <b>\$</b>								This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.		
13 Bond premium on tax-exempt bond <b>\$</b>		14 Tax-exempt and tax credit bond CUSIP no.									This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.	
Account number (see instructions) <b>0004582031</b>		15 State										This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
		16 State identification no.										
		17 State tax withheld <b>\$</b>			This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.							
		<b>\$</b>		This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.								

Form 1099-INT (keep for your records) www.irs.gov/Form1099INT Department of the Treasury Internal Revenue Service

This document is presented to dispute and correct an erroneous Form 1099-INT known to have been submitted to the IRS by the party identified as "PAYER". No proceeds were received by the party identified as "RECIPIENT" from the "PAYER" which were connected to wages as defined in IRC Title 26 USC Section 3401(a) or Section 3121(a). This form should not have been issued as NO such taxable transaction occurred.

Under penalty of perjury, I declare that I have examined this document and its statements and, to the best of my knowledge and belief, it is true, correct, and complete.

3/20/23  
Date

Julie Ann Marlen



Department of the Treasury  
Internal Revenue Service  
Fresno, CA 93888-0025

Notice	CP218
Tax Year	2020
Notice date	October 9, 2023
Social Security number	XXX-XX-XXXX
To contact us	800-829-0922
Your Caller ID	775990
Page 1 of 1	9H



162695-1-8-1 P2 T38 000009715  
JULIE M FREYER  
NORWICH CT 06360-1830

Changes to your 2020 Form 1040  
**Refund due: \$4,810.00**

We made the changes you requested to your 2020 Form 1040 to adjust your:

- income from wages, salaries, tips, etc.
- total federal income tax withheld
- earned income credit

As a result, you are due a refund of \$4,810.00.

**Summary**

Decrease in tax	\$-1,661.00
Increase in credit for tax withheld	-3,322.00
Decrease in credit	173.00
<b>Refund due</b>	<b>\$4,810.00</b>

**What you need to do**

**If you agree with the changes we made**

- If you haven't already received a refund for \$4,810.00, you should receive a refund check within 2-3 weeks as long as you don't owe other tax or debts we're required to collect. Your refund amount may include interest. Keep in mind that any interest you receive on tax refunds is considered taxable income during the year you receive it.

**If you don't agree with the changes**

Call 800-829-0922 to review your account with a representative. Be sure you have your account information available when you call.

If we don't hear from you, we'll assume you agree with the information in this notice.

**Additional information**

- Visit [www.irs.gov/cp21b](http://www.irs.gov/cp21b)
- For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 800-TAX-FORM (800-829-3676).
- You can contact us by mail at the address at the top of this notice. Be sure to include your Social Security number, the tax year, and the form number you are writing about.
- Visit [www.irs.gov](http://www.irs.gov) and search: "Form 8888". See "Changes in Refund due to Math Errors and Refund Offsets" under General Instructions for deposit rules.
- If you have a power of attorney on file with us, a copy has been sent to him/her automatically.
- Keep this notice for your records.

If you need assistance, please don't hesitate to contact us.