

5934

1040 Department of the Treasury - Internal Revenue Service (99) 2018 (12/15/15) 1545-0074 IRS Use Only - Do not write on this area

Filing status:  Single  Married filing jointly  Married filing separately  Head of household  Qualifying widow(er)

Your first name and initial: Robert Last name: Martin Your social security number: [redacted]

Your standard deduction:  Someone can claim you as a dependent  You were born before January 2, 1954  You are blind

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

Spouse standard deduction:  Someone can claim your spouse as a dependent  Spouse was born before January 2, 1954  Spouse is blind  Spouse itemizes on a separate return or you were dual-status alien

Filing electronically (e-file) or e-file with a tax preparer or tax collector

Home address (number and street), if you have a P.O. box, see instructions: Apt. no. Presidential Election Campaign (see instructions)  You  Spouse

City, town or post office, state, and ZIP code, if you have a foreign address, see instructions: Louisiana If more than four separate entries, see instructions and Form 1040-SS

Table with 5 columns: (1) First name, (2) Social Security number, (3) Relationship to you, (4) If qualifying for tax credit, (5) Credit rate for dependents. The table is currently empty.

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true and correct. I declare that I am not the preparer of this return and I am not acting as a preparer for this return.

Spouse's signature: [Signature] Date: 04/07/19 Your occupation: Bankster, Union

Preparer's name, signature, PTIN, Firm's name, address, and EIN information.

2018 (2018)

1		Wages, salaries, tips, etc. Attach Form(s) W-2	1	0	00
2a		Tax-exempt interest	2b	0	00
3a		Qualified dividends	3b	0	00
4a		IRAs, pensions, and annuities	4b	0	00
5a		Social security benefits	5b	0	00
6		Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22	6	0	00
7		Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 36, from line 6	7	0	00
8		Standard deduction or itemized deductions (from Schedule A)	8	17000	00
9		Qualified business income deduction (see instructions)	9	0	00
10		Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0-	10	0	00
11		a Tax (see inst.) <u>0</u> (check if any from: 1 <input type="checkbox"/> Form(s) 9814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/> )	11	0	00
12		b Add any amount from Schedule 2 and check here <input type="checkbox"/>	12		
13		a Child tax credit/credit for other dependents b Add any amount from Schedule 3 and check here <input type="checkbox"/>	13	0	00
14		Other taxes. Attach Schedule 4	14	0	00
15		Total tax. Add lines 13 and 14	15	0	00
16		Federal income tax withheld from Forms W-2 and 1099	16	28004	88
17		Refundable credits: a EIC (see inst.) b Sch. 8812 c Form 8863	17	0	00
18		Add any amount from Schedule 5	18	28004	88
19		Add lines 16 and 17. These are your total payments	19	28004	88
20a		If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you overpaid	20a	28004	88
21		Amount of line 19 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	21	28004	88
22		Amount of line 19 you want applied to your 2019 estimated tax	22		
23		Estimated tax penalty (see instructions)	23		

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

**Standard Deduction for—**

- Single or married filing separately, \$12,000
- Married filing jointly or Qualifying widow(er), \$24,000
- Head of household, \$18,000
- If you checked any box under Standard deduction, see instructions.

**Refund**

Direct deposit? See instructions.

b Routing number

c Type:  Checking  Savings

d Account number

**Amount You Owe**

22 Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions

23 Estimated tax penalty (see instructions)

Form **4852**

(Rev. September 2018)

Department of the Treasury  
Internal Revenue Service

**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. 1545-0046

▶ Attach to Form 1040 or 1040X.

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

1 Name(s) shown on return

*Robert Martin*

2 Your social security number

3 Address

*Louisiana*

4 Enter year in space provided and check one box. For the tax year ending December 31, *2018*.

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

*Baxter House LA  
70891*

6 Employer's or payer's TIN (if known)

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

a Wages, tips, and other compensation *0.00*

b Social security wages *0.00*

c Medicare wages and tips *0.00*

d Social security tips

e Federal income tax withheld *19,819.09*

f State income tax withheld

(Name of state) *LA*

g Local income tax withheld

(Name of locality)

h Social security tax withheld *66,382.9*

i Medicare tax withheld *15,527.50*

*6715.65*

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

a Gross distribution

b Taxable amount

c Taxable amount not determined

d Total distribution

e Capital gain (included in line 8b)

f Federal income tax withheld

g State income tax withheld

(Name of state)

h Local income tax withheld

(Name of locality)

i Employee contributions

j Distribution codes

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

*Records provided by Payer listed on Line 5*

10 Explain your efforts to obtain Form W-2, Form 1099-R, 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 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 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 also must 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 also will 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 indicates that the information reported on your original return is incorrect, 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:

4852

Rev. September 2018)

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 or 1040X.

Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return

Robert ~~Robert~~ Martin

2 Your social security number

3 Address

Louisiana

4 Enter year in space provided and check one box. For the tax year ending December 31, 2018.

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

BNY Mellon Disbursement Agent Cherry Hill, NJ 08003 Raytheon Benefit Center 101 Woodcrest Drive

6 Employer's or payer's TIN (if known)

25-1926855

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

a Wages, tips, and other compensation 0.00 f State income tax withheld
b Social security wages
c Medicare wages and tips
d Social security tips
e Federal income tax withheld
g Local income tax withheld
h Social security tax withheld
i Medicare tax withheld

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

a Gross distribution 0.00 f Federal income tax withheld 0.00
b Taxable amount 0.00 g State income tax withheld 0.00
c Taxable amount not determined
d Total distribution
e Capital gain (included in line 8b)
h Local income tax withheld
i Employee contributions
j Distribution codes

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

Records provided by Payer listed on line 5

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

NONE

General Instructions

Section references are to the Internal Revenue Code.

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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 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 also must 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 also will 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. 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 indicates that the information reported on your original return is incorrect, 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.

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USPS CERTIFIED

IMPORTANT TAX DOCUMENT

CORRECTED COPY

Vanguard

Contact Us for 800-254-7743

RECIPIENT'S TIN: [REDACTED]

2018 Form 1099-DIV  
Dividends and Distributions

ROBERT W. MARTIN  
[REDACTED]

P.O. Box 277  
Valley Forge, PA 19492-0277

Copy 3 Form 1099-DIV  
OMB No. 1545-0047

Fund Name	PAYER TIN	PAYER Account number	State (Box 13)	State Identification no (Box 14)						
Total ordinary dividends (Box 1a)	Qualified dividends (Box 1b)	Total capital gain distr. (Box 2a)	Unrecap. Sec. 1250 gain (Box 2b)	Non-qualif. distributions (Box 3)	Federal income tax withheld (Box 4)	Section 199A dividends (Box 5)	Foreign tax paid (Box 7)	Excess interest dividends (Box 11)	Specified private activity bond interest dividends (Box 12)	State tax (Box 15)
0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The attached and corrected document is submitted to rebut a document suspected or known to have been submitted to the IRS by the party identified above as "PAYER". The stated document erroneously alleged payments to RECIPIENT of taxable proceeds. I hereby certify that no taxable transactions under Title 26 U.S.C. were conducted between PAYER and RECIPIENT.

PAYER acts of his own volition and should consult competent legal counsel regarding the legality of and the legal implications for PAYER'S actions. RECIPIENT has not contacted PAYER.

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

  
Robert W. Martin

09/07/19  
Date