

Form

**1040EZ**

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

**2017**

OMB No. 1545-0074

Your first name and initial <b>Stephen</b>		Last name	Your social security number
If a joint return, spouse's first name and initial <b>Isabelle</b>		Last name	Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions.			Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).			Presidential Election Campaign
Foreign country name <b>TX</b>	Foreign province/state/country	Foreign postal code	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. <input type="checkbox"/> You <input type="checkbox"/> Spouse

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

<b>Payments, Credits, and Tax</b>	7	Federal income tax withheld from Form(s) W-2 and 1099.	7	96290	46
	8a	Earned income credit (EIC) (see instructions)	8a	0	00
	b	Nontaxable combat pay election.	8b		
	9	Add lines 7 and 8a. These are your <b>total payments and credits</b> .	9	96290	46
	10	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.	10	0	00
11	Health care: individual responsibility (see instructions) Full-year coverage <input checked="" type="checkbox"/>	11	0	00	
12	Add lines 10 and 11. This is your <b>total tax</b> .	12	0	00	

<b>Refund</b> Have it directly deposited! See instructions and fill in 13b, 13c, and 13d, or Form 8888.	13a	If line 9 is larger than line 12, subtract line 12 from line 9. This is your <b>refund</b> . If Form 8888 is attached, check here <input type="checkbox"/>	13a	96290	46
	b	Routing number	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
	d	Account number			

<b>Amount You Owe</b>	14	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.	14	0	00
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<b>Third Party Designee</b>	Do you want to allow another person to discuss this return with the IRS (see instructions)? <input type="checkbox"/> Yes. Complete below. <input checked="" type="checkbox"/> No		
Designee's name	Phone no.	Personal identification number (PIN)	

**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.

Joint return? See instructions. Keep a copy for your records.	Your signature	Date	Your occupation	Daytime phone number
	<b>3</b>	3/18/2018	Geologist	
	Spouse's signature, If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	<b>Isabelle</b>	3/18/2018	Geologist	

<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 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.**

OMB No. 1545-0074

Department of the Treasury  
Internal Revenue Service

▶ 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 Stephen	2 Your social security number [REDACTED]
3 Address [REDACTED]	

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.  
*Hereby notify*  
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 [REDACTED]	6 Employer's or payer's identification number (if known) [REDACTED]
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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 . . . . .	42134.78	h Social security tax withheld . . . . .	7886.4
		i Medicare tax withheld . . . . .	2601.69

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"/>	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?  
Lines 7 (a), (b), and (c), are corrected as I did not receive any "wages" as defined in IRC Section 3401(a) and 3121(a). Lines 7 (e), (h), and (i) were derived from the W-2 sent to me.

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

**3** Address

**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	0	<b>f</b> State income tax withheld	0
<b>b</b> Social security wages	0	(Name of state)	
<b>c</b> Medicare wages and tips	0	<b>g</b> Local income tax withheld	0
<b>d</b> Social security tips	0	(Name of locality)	
<b>e</b> Federal income tax withheld	33609.63	<b>h</b> Social security tax withheld	7886.4
		<b>i</b> Medicare tax withheld	2171.56

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

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

**9** How did you determine the amounts on lines 7 and 8 above?  
Lines 7 (a), (b), and (c), are corrected as I did not receive any "wages" as defined in IRC Section 3401(a) and 3121(a). Lines 7 (e), (h), and (i) were derived from the W-2 sent to me.

**10** Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.  
None

**General Instructions**

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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.  
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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:

## Statement to Correct Incorrectly Reported 1099-B Information Return

This document is presented to dispute and correct an erroneous Form 1099-B known to have been submitted to the IRS by the party identified below as "PAYER". No proceeds were received by the party identified hereon as "RECIPIENT" from "the PAYER" which were connected with "trade or business", a governmental unit, agency, or instrumentality thereof or otherwise constituted gains, profits, or income within the meaning of relevant law.

The 1099-B should not have been issued for this amount as NO such taxable transaction occurred.

SSN: [REDACTED] FORM 1099-B

Tax Year: December 31, 2017

Payer: [REDACTED]

Recipient: Stephen [REDACTED]

Form: 1099-B

Acct: [REDACTED]

Consolidated "Payer" amount reported to IRS: \$16,146.52

**Corrected amount for IRS records: \$0.00**

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.

[REDACTED]  
Stephen

3/18/2018

Date

Note: These are proceeds from the sale of stock in companies organized under Union states and not engaged in "trade or business".

## Statement to Correct Incorrectly Reported 1099-DIV Information Return

This document is presented to dispute and correct an erroneous Form 1099-DIV known to have been submitted to the IRS by the party identified below as "PAYER". No dividends were received by the party identified hereon as "RECIPIENT" from "the PAYER" which were connected with any "trade or business" or otherwise constituted gains, profits, or income within the meaning of relevant law.

A 1099-DIV should not have been issued for this amount as NO such taxable transaction occurred.

SSN: [REDACTED] FORM 1099-DIV  
Tax Year: December 31, 2017  
Payer: [REDACTED]  
Payer's Federal Identification Number: [REDACTED]  
Recipient: Isabelle  
Form: 1099-DIV  
Acct: [REDACTED]

Amount reported to IRS: \$816.75  
Amount included on original return: \$816.75

**Corrected amount for IRS records: \$0.00**

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.

\_\_\_\_\_  
Isabelle

03/18/2018

Date

Note: This is a dividend from an international company  
and not engaged in any "trade or business".