Form 4868

Application for Automatic Extension of Time To File U.S. Individual Income Tax Return

OMB No. 1545-0074

2013

Department of the Treasury Internal Revenue Service (99 (on bottom of page)

Mail To: Department of the Treasury Internal Revenue Service

> P.O. Box 1302 Charlotte, NC 28201-1302

Form 4868 Department of the Treasury Internal Revenue Service (99)	Application for Automa To File U.S. Individua	atic Extension of Time I Income Tax Return	OMB No. 1545-0074
Part I Identificatio	For calendar year 2013, or other tax year beginning	ending	
1 Your name(s) (see instructions)	·	Part II Individual Income Tax 4 Estimate of total tax liability for 2013 \$	60,788
Wendy R.	Davis	5 Total 2013 payments	788
Address (sea instructions).		6 Balance due. Subtract line 5 from line 4 (see instructions)	60,000
		7 Amount you are paying (see instr.)	60,000
City, town, or post office	State   ZIP Code   TX   76107	Check here if you are "out of the country" and citizen or resident (see instructions)	a U.S.
2 Your social security number	3 Spouse's social security number	Check here if you file Form 1040NR or 1040NR-EZ and did not receive wages as an employee subject to U.S. income tax withholding.	
or Privacy Act and Paperwo	rk Reduction Act Notice, see page 4.		Form 4868 (2013)

		31, 2013, or other tax y	ear beginning		, 2013, e	nding	, 20			write or staple in this sp parate instructions.
Your first name ar Wendy		I	Last name	<del></del>					لاس	normations.
		first name and initial	Davis				25			
Jone return, Sp		necrianie and initial	Last name						3/4/2	2.35
Home address (nu	mber a	nd street). If you have a	P.O. box, see instructions.				Apt. no.	<b>A</b>	Make	sure the SSN(s) above
City town as near			A STATE OF THE STA							on line 6c are correct.
City, town or post of	office, s	tate, and ZIP code. If yo	ou have a foreign address, also complete	spaces below (see instru	ıçtions).				Pre	esidential Election Cam
Foreign country na	me		Foreign province/state/county		<del></del>	Foreign postal	code		if fill fund not	eck here if you, or your sp ling jointly, want \$3 to go to d. Checking a box below to change your tax or refund
Filing Statu		X Single		4	Head of hous	ehold (with qualify person is a child	ring person). (Se	e instru	ctions	You Spot
Chaole ante ana	. 2		ntly (even if only one had income)	_	child's name	here. 🕨	out not your dep	enuent,	eriter	uiis
Check only one box.	3		parately. Enter spouse's SSN above	5 📗	Qualifying wid	dow(er) with deper	dent child			
	6	and full name he				···				
Exemptions		Spouse	f someone can claim you as a	dependent, do not	t check box	6a			. }	Boxes checked on 6a and 6b
-		Dependents:		······	*********	<del></del>		170	<u>_</u>	No. of children
				(2)	Dependent's	(3) D	ependent's	child age 1	√ if under I7 qual	on 6c who:  i o lived with you  o did not live with
		(1) First name	Last name	social s	ecurity number	relation	nship to you	I LLLX CI	ealt	
f more than four dependents, see					<del></del>		· · · · · · · · · · · · · · · · · · ·	(see i	nstr.)	you due to divorce or separation
nstructions and	_							1-	+	(see instructions)
heck here 🕨								11	+	Dependents on 6c not entered above
	,.	T-1-1						11	1	
	d	l otal number o	f exemptions claimed							Add numbers on lines above
ncome	7 8a	arages, salaties, tibs	5. etc. Attach Form(s) W-2					7		4,4
ttach Form(s)	b		se vergon ponedale p il tedalle	<b>u</b> ,				8a		
V-2 here. Also	9a	Ordinary divider	erest. Do not include on line 8	a	[ 8b ]		358			
ttach Forms V-2G and	b	Qualified divide	nds. Attach Schedule B if requi	rea				9a		3,9
099-R if tax	10	Taxable refunds	nds s, credits, or offsets of state and	d local income toys	. [ 96 ]		3,674			
as withheld.	11	Authority receive	:u				1	10		
you did not	12	Business incom	e or (loss). Attach Schedule C.	or C-EZ				11		150.00
et a W-2,	13	Capital gaill of (1088). F	Attach Schedule D if required, if not required	1. check here 🕪			·····/	13		152,00 9,28
ee instructions.	14	- mor game or (	100000). Attach 1 0/111 4/9/		• • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •		14		
	15a	n or aloutous	)   15a		<b>b</b> Taxabl			15b		
	16a	Pensions and ar			b Taxabl	e amount		16b		
	17 18	Rental real estat	te, royalties, partnerships, S co	rporations, trusts, e	etc. Attach	Schedule E		17		89,72
	19	Unemployment of	(loss). Attach Schedule F					18		
	20a	Social security bene	sompondation				1	19		
	21	Other income. I i	efits20a		b Taxable	amount		20b		
	22	Combine the am	st type and amount ounts in the far right column fo	r lines 7 through 21				21		050 40
	23	Educator expens	20:		23	ui totai incor	ne 👂	22		259,40
_	24	Certain business	expenses of reservists, perfor	ming artists, and		<del></del>				
ross		fee-basis governi	ment officials. Attach Form 210	06 or 2106-F7	24					
~~	25	Health savings ac	ccount deduction. Attach Form	8889	25					
	26	woving expenses	S. Attach Form 3903		26					
	27 20	Deductible part of	f self-employment tax. Attach S	3chedule SE	27		9,652			
	28 20	Seir-employed St	≂P, SIMPLE, and qualified plar	าร	28					
	29 30	seit-employed ne	ealth insurance deduction		20					
	30 31a	Alimony neid L	withdrawal of savings Recipient's SSN ▶							
	31a	rannony palo b	recipient's SSN ▶		31a					
	33	Student loan inter	rest deduction	• • • • • • • • • • • • • • • • • • • •	32					
	34	Tuition and fees	rest deduction Attach Form 8917		33					
	35	Domestic product	ion activities deduction. Attach	Form 8903	34					
			wouldnot Attacit	I OUIT DOUG	35		<b> </b>	*****		
. 3	36	Add lines 23 throu	iah 25	• • • • • • • • • • • • • • • • • • • •				6		9,652

Form 1040 (20	THE RESERVE AND DESCRIPTION OF STREET	endy R. Davis	-98	
Tax an		and the control of (adjusted gloss income)		040 954
Credits	39	Check   Lifetime Forn before January 2, 1949.   Blind 3 T-4-15	. 38	249,754
		Spouse was horn before January 2 1040		
Ctandani		b If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b		
Standard Deductio		Itemized deductions (from Schedule A) or you were a dual-status alien, check here ▶ 39b	_	
for-	41	" VIII VOII VOII VUII SIAII DATO DEDITOTION (SEE INF MORAIN)	40	53,190
People who		Subtract line 40 from line 38	41	196,564
check any	"	Exemptions. If time 38 is \$150,000 or less, multiply \$3,900 by the number on time of our	42	3,900
box on line 39a or 39b or	43	The state of the s	43	
who can be claimed as a	44	Tax (see instr.). Check if any from: a Form(s) b Form c Form	44	192,664
dependent,	45	Alternative minimum tax (see instructions). Attach Form 6251	. 45	45,591
see instructions.	46			4,562
All others:	47	Foreign tax credit. Attach Form 1116 if required 47	▶ 46	50,153
Single or	48	Credit for child and donondont and a second	크	
Married filing separately,	49	Education credite from Form 2002 III. 48		
\$6,100	50	Education credits from Form 8863, line 19 49		
Married filing	51	Retirement savings contributions credit. Attach Form 8880 50		
jointly or Qualifying		Child tax credit. Attach Schedule 8812, if required 51		
widow(er), \$12,200	52	Residential effergy credits. Attach Form 5695		
Head of	53	Other credits from Form: a 3800 b 8801 c 53	-	
household,	54	Add lines 47 through 53. These are your total credits	-	_
\$8,950	55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	54	3
Other	56			50,150
Taxes	57	Unreported social security and Medicare tax from Form: a 4137 b 8919	56	19,304
IGAGS	58	Additional tay on IPAs other qualified and analysis of the partial and the par	57	
	59a	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
	b	Transcription amployment (axes from Schedille H	1 1	
	60		59b	
	61	Political Communications and a conference of the	60	798
		The strict of through oc. This is your total tax	61	70,252
Payments	62	rederal income tax withheld from Forms W-2 and 1000		10,232
		2013 estimated tax payments and amount applied from 2012 return		
If you have a qualifying	64a	Earned Income credit (EIC)	-	
child, attach	b	Normanable Combat pay election [645]	-	
Schedule EIC.	65	Additional child tax credit, Attach Schedule 8812		
	66	American opportunity credit from Form 8863, line 8 66	-	
	67			
	68	Amount paid with request for extension to file 68 60,000		
	69			
	70			
	71	Credit for Form 5 area - 70		
		Credits from Form: a 2439 b Reserved c 8885 d 71		
Refund		Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	60,788
Refulla	73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	00,700
B1	/4a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here	74a	
Direct deposit? See	₽ b	Routing number C Type: Checking Savings		
instructions.		Account number		
6	75	Amount of line 73 you want applied to your 2014 estimated tax ▶   75		
Amount	76	Amount you owe. Subtract line 72 from line 61. For details on how to nay see instructions	76	10 710
You Owe		estimated tax penalty (see instructions)	70	<u>10,710</u>
Third Party	Do you v	VADI IO AllOM another person to discuss this		
Designee	Designee's		te below.	No
	name	Personal Identification number (PIN)		
Sign Here	Under pena	ties of penury, I declare that Than examined this return and accompanying schedules and statements, and to the best of my knowledge, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
Here	Your signate	r, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	and belief,	
Joint return?		Date Your occupation		ime phone number
See instr. Keep a copy	Spousola ale			
	obouse a sig	nature. If a joint return, both must sign.  Date Spouse's occupation	If the Prote	IRS sent you an Identity ction PIN it here
records.	ot/Type pro-	Office name	enter (see i	it here nstr.)
	nt/Type prep	Prepared Date		# PTIN
Paid		07/03/14		
	n's name	Fire	n's EIN ▶	
Use Only Fim	n's address			A CONTRACTOR OF THE PARTY OF TH
	···	Pho	one no.	
DAA				Form 1040 (2013)

Form **2210** 

Department of the Treasury Internal Revenue Service Name(s) shown on tax return

Underpayment of Estimated Tax by
Individuals, Estates, and Trusts

▶ Information about Form 2210 and its separate instructions is at www.irs.gov/form2210. ▶ Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

OMB No. 1545-0140 Attachment Sequence No. **06** 

Identifying number

Wendy R. Davis					
Do You Have	To Fi	le Form 2210?			
Complete lines 1 through 7 below. Is line 7 less than \$1,000?	Yes	Do not file Form 2210. Yo	ou do not ou	/A a panaltu	
No			od do not ow	e a penaity.	
Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?	Yes	You do not owe a penalty. (but if box E in Part II applie Form 2210).	Do not file l	Form 2210 t file page 1 of	
No					<del></del>
You may owe a penalty. Does any box in Part II below apply?	Yes	You must file Form 2210. [ apply?	Does box B,	C, or D in Part II	
No .	•	No V	Yes	You must figure y	our penalty.
Do not file Form 2210. You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but do not file Form 2210.		You are not required to figure will figure it and send you a want to figure it, you may us worksheet and enter your pebut file only page 1 of Form	bill for any u se Part III or enalty amou	inpaid amount. If yo Part IV as a	ou
Part I Required Annual Payment					
1 Enter your 2013 tax after credits from Form 1040, line 55 (see instructional content and the second secon	ctions if not	filing Form 1040)			
	noi Medicar	a Tay and/or Net	1	1	50,150
investment income Tax (see instructions)			ĺ	2	20 102
				3 (	20,102
4 Culterit year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop	; you do not	owe a penalty.	····-		/
Do not file Form 2210  5 Multiply line 4 by 90% 7 900				4 7	0,252
(.00)		5 63	3,227		<u> </u>
	uctions)			6	788
	a penalty. D	o not file Form 2210	L	7 6	9,464
8 Maximum required annual payment based on prior year's tax (see ins 9 Required annual payment. Enter the smaller of line 5 or line 8	structions)				6,969
				9 6	3,227
No. You do not owe a penalty. Do not file Form 2210 unless box Yes. You may owe a penalty, but do not file Form 2210 unless of a lif box B, C, or D applies, you must figure your penalty and file Form by life box A or E applies (but not B, C, or D) file only page 1 of Form will figure it and send you a bill for any unpaid amount. If you wan	ne or more b Form 2210. n 2210. You	poxes in Part II below applies.	ur popolity ti	he IRS	
worksheet and enter your penalty on your fax return but file only	nage 1 of E	our penaity, you may use Part	t III or IV as	а	
Reasons for Filing. Check applicable boxes. If	none ann	v do not file Form 221	^		***************************************
A You request a waiver (see instructions) of your entire penalty. You are not required to figure your penalty.	u must chec	k this box and file page 1 of F	0. Form 2240. J	but you	<del></del>
B You request a waiver (see instructions) of part of your penalty. You 2210.	ou must figu	re your penalty and waiver an	nount and fil	le Form	-
C Your income varied during the year and your penalty is reduced or installment method. You must figure the penalty using Schedule	r eliminated	when figured using the annua	alized incor	me	
Your penalty is lower when figured by treating the federal income actually withheld, instead of in equal amounts on the payment due	tax withheld	from your income as hald on	the dates it	was	
You filed or are filing a joint return for either 201 above. You must file page 1 of Form 2210, but you are not require		d line 8 above is smalle			*
For Paperwork Reduction Act Notice, see separate instructions.	-4			Form 2	210 (2013)

Wendy R. Davis



Form 2210 (2013) Part III **Short Method** Page 2 Can You Use the You may use the short method if: **Short Method?**  You made no estimated tax payments (or your only payments were withheld federal income tax), or You paid the same amount of estimated tax on each of the four payment due dates. Must You Use the You must use the regular method (Part IV) instead of the short method if: Regular Method? You made any estimated tax payments late, You checked box C or D in Part II, or You are filing Form 1040NR or 1040NR-EZ and you did not receive wages as an employee subject to U.S. income tax withholding. Note: If any payment was made earlier than the due date, you may use the short method, but using it may cause you to pay a larger penalty than the regular method. If the payment was only a few days early, the difference is likely to be small.

10	Enter the amount from Form 2210, line 9		***************************************	10	63,227
11	Enter the amount, if any, from Form 2210, line 6	11		88	
	Enter the total amount, if any, of estimated tax payments you made	12			
13	Add lines 11 and 12	· · · · · · · · · · · · · · · · · · ·		13	788
14	Total underpayment for year. Subtract line 13 from line 10. If zero or less, stop; you do not a penalty. Do not file Form 2210 unless you checked box E in Part II	10t 0111	_	14	62,439
	Multiply line 14 by .01995			i i	1,246
	<ul> <li>If the amount on line 14 was paid on or after 4/15/14, enter -0</li> <li>If the amount on line 14 was paid before 4/15/14, make the following computation to find amount to enter on line 16.</li> </ul>				
	Amount on Number of days paid line 14 x before 4/15/14 x .00008		*******************	16	0
i	Penalty. Subtract line 16 from line 15. Enter the result here and on Form 1040, line 77; Form 1040A, line 46; Form 1040NR, line 74; Form 1040NR-EZ, line 26; or Form 1041, line 26. Do not file you checked a box in Part II	Form	2210 unless		
	you checked a box in Part II			17	1.246

Form 2210 (2013)

### SCHEDULE A (Form 1040)

Itemized Deductions

▶ Information about Schedule A and its separate Instructions is at www.irs.gov/schedulea.

OMB No. 1545-0074

Department of the Treasury Attach to Form 1040. Internal Revenue Service Attachment Name(s) shown on Form 1040 07 Sequence No Wendy R. Davis Caution. Do not include expenses relmbursed or paid by others. Medical 1 Medical and dental expenses (see instructions) and 1 Enter amount from Form 1040, line 38 Dental Multiply line 2 by 10% (.10). But if either you or your spouse was **Expenses** born before January 2, 1949, multiply line 2 by 7.5% (.075) instead Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-4 Taxes You State and local (check only one box): Paid Income taxes, or 2,367 X General sales taxes 6 Real estate taxes (see instructions) 6 23,506 Personal property taxes 7 Other taxes. List type and amount > 9 Add lines 5 through 8 8 9 25,873 Interest 10 Home mortgage interest and points reported to you on Form 1098 10 You Paid 11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address Note. Your mortgage ...... interest deduction may be limited (see 11 instructions). Points not reported to you on Form 1098. See instructions for special rules 12 Mortgage insurance premiums (see instructions) 13 14 Investment interest. Attach Form 4952 if required. (See Instructions.) 14 15 Add lines 10 through 14 15 22,573 Gifts to 16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions Charity 16 327 17 Other than by cash or check. If any gift of \$250 or more, see If you made a instructions. You must attach Form 8283 if over \$500 gift and got a 17 benefit for it. 18 Carryover from prior year \_\_\_\_\_\_ 18 see instructions. 19 Add lines 16 through 18 19 <u>4</u>,327 Casualty and Theft Losses 20 Casualty or theft loss(es). Attach Form 4684. (See instructions.) Job Expenses 21 Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. and Certain (See instructions.) ▶ Miscellaneous Deductions 21 22 Tax preparation fees 22 4,670 23 Other expenses-investment, safe deposit box, etc. List type and amount Advisor fees 23 24 Add lines 21 through 23 24 25 Enter amount from Form 1040, line 38 25 26 Multiply line 25 by 2% (.02) ..... 4,995 27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-417 28 Other—from list in instructions. List type and amount ▶ Other Miscellaneous Deductions 29 Is Form 1040, line 38, over \$150,000? Total No. Your deduction is not limited. Add the amounts in the far right column Itemized for lines 4 through 28. Also, enter this amount on Form 1040, line 40. **Deductions** 53,190 Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter. 30 If you elect to itemize deductions even though they are less than your standard deduction, check here

### SCHEDULE B

(Form 1040A or 1040)

Name(s) shown on return

Department of the Treasury Internal Revenue Service (99) Interest and Ordinary Dividends

Attach to Form 1040A or 1040.

Information about Schedule B (Form 1040A or 1040) and its instructions is at www.irs.gov/scheduleb.

OMB No. 1545-0074

2013

Attachment Sequence No.

Wendy R. Davis List name of payer. If any interest is from a seller-financed mortgage and the Part I buyer used the property as a personal residence, see instructions on back and list **Amount** Interest this interest first. Also, show that buyer's social security number and address  $\blacktriangleright$ American National Bank of TX National Financial Services Southwest Bank (See instructions on back and the \*\* Subtotal \*\* instructions for Tax-Exempt Interest Form 1040A, or Form 1040. 1 line 8a.) Note. If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the Add the amounts on line 1 payer and enter Excludable interest on series EE and I U.S. savings bonds issued after 1989. 2 8 the total interest Attach Form 8815 shown on that Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form form. 1040, line 8a Note. If line 4 is over \$1,500, you must complete Part III. 8 Part II **Amount** List name of payer ▶ Starbanc Holding Co Ordinary 3,500 National Financial Services Dividends Taxable Dividend Income (See Instructions Tax-Exempt Dividend on back and the \*\* Subtotal \*\* instructions for Tax-Exempt Dividend Form 1040A, or Form 1040, line 9a.) 5 Note. If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter Add the amounts on line 5. Enter the total here and on Form 1040A, or Form the ordinary 1040, line 9a dividends shown 6 3,958 on that form. Note. If line 6 is over \$1,500, you must complete Part III. You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust. Yes No Part III . 7a At any time during 2013, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign Foreign country? See Instructions Χ Accounts If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), formerly TD F 90-22.1, to report that financial interest or signature authority? and Trusts See FinCEN Form 114 and its instructions for filing requirements and exceptions to those (See instructions on If you are required to file FinCEN Form 114, enter the name of the foreign country where the back.) financial account is located ..... During 2013, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions on back .

### 2534 07/03/2014 11:02 AM

### SCHEDULE C (Form 1040)

Department of the Treasury Internal Revenue Service

(99)

### **Profit or Loss From Business**

(Sole Proprietorship)

For information on Schedule C and its instructions, go to www.irs.gov/schedulec.
 Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.

Attachment Sequence No.

N	ame of proprietor			1) Paratorampa generally illust life			Sequence N	10. U9
	Wendy R. Davis				Soc	al security	number (SSN)	
A	Principal business or profession,	including pr	roduct or service (see instru	ctions)				
	Attorney		The second secon	Sionay	l <sub>B</sub>		le from Instructions	
С	Business name. If no separate bu	isiness nam	ne, leave blank.				1100	
	-		2121110		P	Employer	ID number (EIN), (se	e instr.)
E	Business address (including suite	or room no	o.) > 2 = 2 = 2 = 2 = 2 = 2 = 2 = 2 = 2 = 2		ـــــــ			
	City, town or post office, state, an	d ZIP code		·				
F	Accounting method: (4)	X Coch	(3)	Other (specify)				
G	Did you "materially participate" in	the operatio	on of this husiness during 20	Other (specify)   13? If "No," see instructions for limit of the control of		••••••	X Yes	اسم
Н				TOT IT NO, See instructions for limit o	n iosse	<i>'</i> S	. X Yes	No
1	Did you make any payments in 20	I I S THAT WOLL	IId require you to file Form/a	\ 10002 ( tt(t)			<del>                                     </del>	
J	Jan Journal of	uired Forms	s 1099?	) 10997 (see instructions)	• • • • • • •		Yes	X No
	Part I Income					*******	Yes	No
1	Gross receipts or sales. See instru	ctions for li	ine 1 and check the box if thi	s income was reported to you on		7		
	Form vv-2 and the "Statutory empl	oyee" box o	In that form was checked		□		100	
2	4					1	120	0,000
3	Subtract line 2 from line 1		***********************	·····	• • • • • • •	2	100	
4	Cost of goods sold (from line 42)	• • • • • • • • • • • • • •	* * * * * * * * * * * * * * * * * * * *	•••••		3	120	000,000
5	Gross profit. Subtract line 4 from	line 3	• • • • • • • • • • • • • • • • • • • •	ructions)	• • • • •	4	100	
6	Other income, including federal and state	e gasoline or i	fuel tax credit or refund (see inst-	ructions)	• • • • • •	5	120	000,000
7	The same of the sa		and the second second			6	100	
	art II Expenses	Ent	ter expenses for busi	ness use of your home only	An liv	7	120	,000
8	Advertising	8	18	Office expense (see instructions)	OII III	1	<del></del>	
9	oai and truck expenses (see		19	Pension and profit-sharing plans	• • • • • •	18		
	instructions)	9	20	Rent or lease (see instructions):	• • • • •	19		
10	Commissions and fees	10	a	Vehicles, machinery, and equipment	-4	00		
11	Contract labor (see instructions)	11	b	Other hysiness property	ш	20a		
12	Depletion	12	21	Other business property Repairs and maintenance		20b		
13	Depreciation and section 179		22	Supplies (not included in Part III)		21		
	expense deduction (not included in Part III) (see		23	Taxes and licenses	• • • • •	22		<del></del>
	instructions)	13	24	Travel, meals, and entertainment:		23	· · · · · · · · · · · · · · · · · · ·	
14	Employee benefit programs		a	Travel				
	(other than on line 19)	14	b	Deductible meals and	• • • • •	24a	···-	
15	Insurance (other than health)	15		entertainment (see instructions)		245		
16	Interest:		25	1 14:11:41		24b	·	
а	Mortgage (paid to banks, etc.)	16a	26	Wages (less employment credits)		26		
b	Other	16b				-20		<del></del>
			27a	Other expenses (from line 48)		27a		
17	Legal and professional services		b	Reserved for future use	•••••	27b		
28	Total expenses before expenses fo	r business (	use of home. Add lines 8 thr	ough 27a	<u> </u>	28	A Later Committee of the Committee of th	0
29	Tentative profit or (loss). Subtract lin			***************************************		29	120	,000
30	Expenses for business use of your h	iome. Do no	ot report these expenses else	ewhere. Attach Form 8829	• • • • • • • • • • • • • • • • • • • •		120	,000
	unless using the simplified method (	see instruct	tions).		İ			
	Simplified method filers only: enter	er the total s	square footage of: (a) your he	ome:	1	1		
	and (b) the part of your home used for	or business	: Use the Si	mplified	ĺ			
	Method Worksheet in the instruction			0	1	30		
31	Net profit or (loss). Subtract line 30				• •			AND RESIDENCE OF STREET
	<ul><li>If a profit, enter on both Form 104</li></ul>	0, line 12 (d	or Form 1040NR, line 13) a	nd on Schedule SE, line 2.				
	(If you checked the box on line 1, see	e instruction	ns). Estates and trusts, enter	on Form 1041, line 3.		31	120	000
	<ul><li>If a loss, you must go to line 32.</li></ul>			·			<u> </u>	
32	If you have a loss, check the box tha	t describes	your investment in this activ	ity (see instructions).	7			
	<ul><li>If you checked 32a, enter the loss</li></ul>	on both <b>Fo</b> r	rm 1040, line 12, (or Form 1	1040NR, line 13) and		32a	All investment is	at risk.
	on Schedule SE, line 2. (If you ched	ked the box	x on line 1, see the line 31 in	structions). Estates and	•	32b	Some investment	
	trusts, enter on Form 1041, line 3.				Ì	_	at risk.	
	• If you checked 32b, you must attach	ch Form 61	198. Your loss may be limited	i.				

### 2534 07/03/2014 11:02 AM

### SCHEDULE C (Form 1040)

Name of proprietor

Department of the Treasury Internal Revenue Service

### **Profit or Loss From Business**

(Sole Proprietorship)

▶ For Information on Schedule C and its Instructions, go to www.irs.gov/schedulec. ▶ Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.

OMB No. 1545-0074

****	Wendy R. Davis					Soc	al securi	ty number (SSN)
Α		includi	ng product or service (see	instru	ctions)			<u> </u>
-	BOOK			ii ioti u	olionay	В		de from instructions
С		ısiness	name, leave blank.					11510
	<u>Croquet and Othe</u>	r Ga	ames LLC			D	Employe	or ID number (EIN), (see instr.)
E	Business address (including suite	or roo	m no.) >					· · · · · · · · · · · · · · · · · · ·
****	City, town or post office, state, an	d ZIP o	ode			,		
F	Accounting method: (1)	X C	ash (2) Assert	(3)	Other (engelfs)	<b>E</b>		
G	Did you materially participate" in	the one	eration of this business dur	ina 20	1420 If "NI - B ! ! !!		• • • • • • •	٠٠٠٠ المسان ١٠٠٠ ١٠٠٠ اليال ١٠٠٠
Н								
i	Did you make any payments in 20	13 that	would require you to file F	orm/s	s) 1099? (see instructions)		• • • • • •	▶ X
J	The second secon	uired F	orms 1099?	Omi	7 10997 (See Instructions)			Yes X No
	Part I Income	Western Company of the Company of th	MP-	******				Yes No
1	Gross receipts or sales. See Instru	ıctions	for line 1 and check the ho	ox if th	is income was reported to you ar			
	Form W-2 and the "Statutory empl	ovee" l	oox on that form was check	ked			١.	100
2	Returns and allowances	•	The second secon			▶ ∐	1	132,000
3	Subtract line 2 from line 1	• • • • • • • •	***************************************				2	
4							3	132,000
5	Gross profit Subtract line 4 from	lina 2			ructions	• • • • •		1.00
6	Other income, including federal and state	e gasolii	ne or fuel tax credit or refund /s	ee inst	ructions)		5	132,000
7	Gross income. Add lines 5 and 6		the second secon	,,,,,,			6	1.00
	art II Expenses		Enter expenses for	husi	ness use of your home only	<u> </u>	7	132,000
8	Advertising	8		18	Office expense (see instructions)	)N III		
9	Car and truck expenses (see			19	Pension and profit-sharing plans	• • • • •	18	
	instructions)	9		20	Rent or lease (see instructions):		19	
10	Commissions and fees	10		a	Vehicles, machinery, and equipmen			
11	Contract labor (see instructions)	11		ь	Other husiness property	• • • •	20a	
12	Depletion	12		21	Other business property		20b	
13	Depreciation and section 179			22	Repairs and maintenance	· · · ·	21	<del></del>
	expense deduction (not	1		23	Supplies (not included in Part III) Taxes and licenses	• • • •	22	
	included in Part III) (see instructions)	13		24	Travel, meals, and entertainment:		23	· · · · · · · · · · · · · · · · · · ·
14	Employee benefit programs			a				
	(other than on line 19)	14		b	Travel Deductible meals and		24a	
15	Insurance (other than health)	15			entertainment (see instructions)			
16	Interest:			25			24b	
а	Mortgage (paid to banks, etc.)	16a		26	Wages (less employment credits)		25	
b	Other	16b		20	**ages (less employment cledits)		26	
	***************************************			27a	Other expenses (from line 48)		22-	
17	Legal and professional services	17	100,000	b	Reserved for future use		27a 27b	
28	Total expenses before expenses for	r busin	ess use of home. Add line	s 8 thr	ough 27a	<u>···</u>	28	100,000
29	Tentative profit or (loss). Subtract lin	e 28 fr	om line 7				29	32,000
30	Expenses for business use of your h	ome. [	o not report these expens	es els	ewhere, Attach Form 8829	··· }		32,000
	unless using the simplified method (	see ins	tructions).					
	Simplified method filers only: enter	er the to	otal square footage of: (a)	your h	ome:	[		
	and (b) the part of your home used f	or busi	ness: Use	the Si	mplified	Ì		
	Method Worksheet in the instruction	s to fig	ure the amount to enter on	line 3	0	ł	30	
31	Net profit or (loss). Subtract line 30	from I	ne 29.		***************************************	···		
	<ul> <li>If a profit, enter on both Form 104</li> </ul>	0, line	12 (or Form 1040NR, line	13) a	nd on Schedule SE, line 2.	$\neg$		
	(If you checked the box on line 1, se	e instru	ctions). Estates and trusts	, ente	r on Form 1041, line 3.		31	32,000
	If a loss, you must go to line 32.					٦,	<u> </u>	02/000
32	If you have a loss, check the box tha	t descr	ibes your investment in thi	s activ	vity (see instructions).	$\neg$		
	<ul> <li>If you checked 32a, enter the loss</li> </ul>	on boti	n <b>Form 1040, line 12,</b> (or F	orm 1	1040NR, line 13) and		32a	All investment is at risk.
	on Schedule SE, line 2. (If you ched					•	32b	Some investment is not
	trusts, enter on Form 1041, line 3.							at risk.
	e If you checked 32b, you must atta	ch For	m 6198. Your loss may be	limited	d.			

STATEMEN"
Customer Service: 800-337 2013 TAX REPORTING WENDY R DAVIS Account No. Recipient ID No.

FORM 1099-B\*

2013 Proceeds from Broker and Barter Exchange Transactions

A. Copy.B.loc. Recipient. On B. NO 115 Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(IRS Form 1099-B box numbers are shown below in bold type)

8 Descript	ion, 1d Stock of	8 Description, 1d Stock or Other Symbol, CUSIP			medicale stown below in bold type)	bold type)			
Action	1a Date of Sale or Exchange	1b Date of Acquisition		2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale	1 1	
ABERDEE Sale Sale Sale	EN EMERGING 01/29/13 04/12/13 10/10/13	ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, 003021250 Sale 04/12/13 12/21/11 39.726 Sale 04/12/13 12/21/11 17.173 Sale 10/10/13 12/21/11 13.843 Subtotals		636.80 270.64 208.90	526.01 227.39 183.31	110.79 43.25 25.59	Disallowed	income Tax State Withheld	7
ASTON/R	VER ROAD IN	ASTON/RIVER ROAD INDEDENDENT VALUE AS 1		1,110,34	936.71				
Sale Sale	01/29/13	05/10/11 05/10/11 05/10/11	AKIVX, 00080Y611 47.783 26.187	528.00	521.70	6.30			; 1 1
Subtotals	1		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	819.20	807.61	5.29			
COLUMBIA	A DIVIDEND O	COLUMBIA DIVIDEND OPPORTUNITY CL A, INUTX, 19763P283	TX, 19763P283	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1
Sale Sale	01/29/13 02/15/13	10/18/10	297.375 32.000	2,735.85	2,218.54	517.31			1 1 1 1
Sale	04/12/13	various	118.363	7 152 86	238.73	57.91			٠
Sale	10/10/13	08/26/11	11.749	117.96	883.04	269.82			
Subtotals	 	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		4,303.31	3,427.96	30.31			
COLUMBIA Sale	A SELECT LRG 01/29/13	COLUMBIA SELECT LRG CAP GROWTH CLASS A, ELGAX, Sale 01/29/13 08/26/11	A, ELGAX, 19765Y712	0.196.00					1
Sale	04/12/13	various	112,000	1,736,00	2,949.67	624.86			
Sale	10/10/13	12/21/11	6.814	120.61	1,352.12 82.26	383.88			
Subtotals	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		5,431.14	4,384.05	38.35			

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you



02/23/2014 9006035238



### 2013 TAX REPORTING WENDY R DAVIS

STATEMENT

Justomer Service: 800-333Payer's Fed ID Number:

Account No. Recipient ID No.

Copy B for Recipient CIMB NO 152 Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II 2013 Proceeds from Broker and Barter Exchange Transactions FORM 1099-B

			5 Wash Sale 4 Federal	Disallowed Metable				1 7 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4				00.0		0.77
hold has	(add) more		Gain/Loss (-)			09.7			0.00	ilentantententententententententententen		62.65	-18.36	
Circle Full 1039-B box numbers are shown below in Polation			3 Cost or Other Basis (b)		127.33	20.12	* * * * * * * * * * * * * * * * * * * *	1	1.21	of Section Sec	2,840.99	•		
LOUIS 1088-B DOX DI			Za Sales Price of Stocks, Bonde of C	Donas, etc. (a)	134.93			7.27		2 005 20	67,000,70	ain	OSS ·	
		1	Sold	T ROWE PRICE INTL STOCK ADVISOR CL BALTY 7705211872	9.111		WELLS FARGO ULTRA SHRT TRM MUNI CL A, SMAVX, 949917884	1.510			1	Box D Long-lerm Realized Gain	Box D Wash Sale I oss Disallound	
	8 Description, 1d Stock or Other Symbol, CUSIP	th Date of	Acquisition	TOCK ADVISOR C	03/21/12		SHRT TRM MUNI	various	solicitating in the familiar feet feet feet feet feet feet feet fee			XOG	Box	
	ption, 1d Stock	1a Date of	Sale or Exchange	PRICE INTL S	06/06/13		ARGO ULTRA	10/10/13	olitoliseliseliseliseliseliseliseliseliselise					
	8 Descri	Action		<b>TROWE</b>	Sale		WELLS	Sale	Controllectural coloring and property of the control of the coloring of the co	TOTALS				

" This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you

02/23/2014 9006035238

Pages 5 of 24

## 2013 TAX REPORTING WENDY R DAVIS

STATEMENT
Customer Service: 800.333 Payer's Fed ID Number: 3

Account No. Recipient ID No.

FORM 1099-B\* 2013 Proceeds from Broker and Barter Exchange Transactions Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II

			(IRS F	orm 1099-B box num	(IRS Form 1099-B box nijmbers and change	Alcohor allow	acca and ochequie D, Part II	art II	
8 Descrip	tion, 1d Stock o	8 Description, 1d Stock or Other Symbol, CUSIP			are strown below in	bold type)			
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks,	3 Cost or Other Basis (b)	Gain/Loss (-).	5 Wash Sale		13
ABERDEE Sale	EN EMERGING 10/10/13	ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, Sale 10/10/13 various 1	GEGAX, 003021250 1.472	22.21	8 8		Loss	Income Tax State Withheld	9
DOUBLEL Sale Sale	.INE TOTAL RT 04/12/13 10/10/13	DOUBLELINE TOTAL RT BOND FD CL N, DLTNX, 258620202         Sale       04/12/13       various       22.723         Sale       10/10/13       03/21/12       5.005	, 258620202 22.723 5.005	258.80	254.42	1.42			f t t t
Subtotals			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	313.55	310.51	-1.34	0.29		
DRIEHAUS Sale	S ACTIVE INCC 04/12/13	DRIEHAUS ACTIVE INCOME FUND, LCMAX, 262028855 Sale 04/12/13 various 36	:028855 36.392	391.22	385.99	5.23	6770		;
· FIDELITY   Sale	INTER MEDIAT 04/12/13 10/10/13	FIDELITY INTER MEDIATE MUNI INCOME, FLTMX, 31638R204 Sale 04/12/13 various 81.066 Sale 10/10/13 03/21/12 8.008	X, 31638R204 81.066 8.008	864.97	854.39	10.58			
Subtotals	; ; ; ; ;	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		. <b>.</b>	84.37 938.76	-2.53	0.48		
FORWARI Sale	D EM CORPOR 04/12/13	FORWARD EM CORPORATEDEBT FUND INVESTOR, FFXRX, 349913657 Sale 04/12/13 various 6.065	TOR, FFXRX, 34991365 6.065	60.47	58.86	18	0.48		
JPMORGA Sale	NN TAX AWARE 06/06/13	JPMORGAN TAX AWARE REAL RTRN SELECT CL, TXRSX, 4812A2546 Sale 06/06/13 various 77.509	31, TXRSX, 4812A2546 77.509	792.14	806.63	14.49			
MFS INTEI Sale	RNATIONAL VA 04/12/13	MFS INTERNATIONAL VALUE FUND CL A, MGIAX, 55273E301 Sale 04/12/13 03/21/12 4.830	X, 55273E301 4.830	144.23	124.60	19.63			;
MORGAN	STANLEY GLOI 04/12/13	MORGAN STANLEY GLOBAREAL ESTATE PORT P, MRLBX, 61744J135 Sale 04/12/13 03/21/12 6.733	P, MRLBX, 61744J135 6.733	72.45	60.25	12.20			
			1	**********					

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you

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### 2013 TAX REPORTING WENDY R DAVIS

STATEMEN

Customer Service: 80 Payer's Fed ID Number:

Account No. Recipient ID No.

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I (This Label is a Substitute for Boxes 1c & 6) 2013 Proceeds from Broker and Bairter Exchange Transactions FORM 1099-B\*

(IRS Form 1099-B box numbers are shown below in bold type)

4 Federal	Gain/Loss (-)	3 Cost or Other Basis (b)	44 Sales Price of Stocks, Bonds, etc. (a)		Acquisition	Sale or Exchange
	-0.30	151.22	76.001		industries de l'action de l'ac	
	9	151.22	150.92	WELLS FARGO ULTRA SHRT TRM MUNI CL A, SMAVX, 949917884 Sale 10/10/13 various 31.306	SHRT TRM MUN various	RGO ULTRA 10/10/13
	50.79	852.22	956.32		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 2 5 6 1 1
	53.31	327.18	377.97	129,442	10/12/12	04/12/13
		525.04	578.35	WASSTUD FROM LEK EMEKGING SMALL CO'S, WAFMX, 936793819 Sale 01/29/13 10/12/12 213.413	EMERGING SMA 10/12/12	01/29/13
	. 22.31	317.33	339.64	13.048	07/12/12	01/08/13
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	TCW SMALL CAP GROWTH CLASS N, TGSNX, 87234N666	WTH CLASS N, T	LL CAP GRO
	. 75.07	492.42	663.40		1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
	26.47	229.50	255.97	25.648	various	06/06/13
	34.43	170.02	204.45	19.001	07/12/12	04/12/13
	4	92.90	102.98	10.382	03/21/12	02/15/13
Disallowed Withheld W				MORGAN STANLEY GLOBAREAL ESTATE PORT P, MRLBX, 61744J135	OBAREAL ESTA	STANLEY GL
4 Federal	Gain/Loss (-)	J Cost or Other Basis (b)	of Stocks, Bonds, etc. (a)		Acquisition	Sale or Exchange
			מינים מינית היינית		ID Date of	a Date of
				1e Quantity	Action 42 Date of	

\* This is important tax information and is being furnished to the Internal Revenue Service. 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.





2013 TAX REPORTING STATEMENT WENDY R DAVIS

Recipient ID Not The Payer's Fed ID Number: 1885

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I (This Label is a Substitute for Boxes 1c & 6) 2013 Proceeds from Broker and Barter Exchange Transactions FORM-1099-B\*

(IRS Form 1099-B box numbers are shown below in bold type)

		) CVII)	JIIII 1038-15 DOX numb	(in second 1099-B box numbers are shown below in	bold type)		
8 Description, 1d Stock	8 Description, 1d Stock or Other Symbol, CUSIP			- 1	(adl		
Action 1a Date of Sale or Exchange	1b Date of Acquisition		2a Sales Price of Stocks, Bonds. etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale	1 1
ABERDEEN EMERGING Sale 10/10/13	ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, 003021250 Sale 10/10/13 various 0.774		11.67	10.94	0.770	Disallowed	wicome rax State Witthheld
CLEARBRIDGE SIMALL Sale 01/29/13 Sale 04/12/13	CLEARBRIDGE SMALL CAP GRW CL A, SASMX, 52470H815 Sale 01/29/13 01/09/13 30.140 Sale 04/12/13 01/09/13 17.090	, 52470H815 30.140 17.090	645.60 385.39 <b>1,030.99</b>	624.80 359.23 984.03	20.80		
FORWARD EM CORPO Sale 01/29/13 Sale 04/12/13 Subtotals	FORWARD EM CORPORATEDEBT FUND INVESTOR, FFXRX, 349913657 Sale 04/12/13 various 38,980 Subtotals	TOR, FFXRX, 34991365 97.097 38.980	7 975.82 388.63 1,364.45	942.14 378.31 1.320.45	33.68		
JP MORGAN STRATEG Sale 04/12/13	JP MORGAN STRATEGIC INCOME OPPORT A, JSOAX, 4812A4385 Sale 04/12/13 27.000	JSOAX, 4812A4385 27.000	322.11	321.03	90		
JPMORGAN TAX AWAF Sale 06/06/13	JPMORGAN TAX AWARE REAL RTRN SELECT CL, TXRSX, 4812A2546 Sale 06/06/13 various 7.190	21, TXRSX, 4812A2546 7.190	73.47	74.84	1.37		
MERGER FUND, MERFX, 589509108 Sale 02/15/13 12/28/12	X, 589509108 12/28/12	2.285	35.99	36.03	-0.04		
MERK HARD CURRENC Sale 06/06/13 Sale 06/06/13 Subtotals	MERK HARD CURRENCY FUND INVESTOR CI, MERKX, 34984T402 Sale 04/12/13 10/12/12 Sale 06/06/13 various 30.47/1 Subtotals	MERKX, 34984T402 21.712 30.471	261.41 361.39 622.80	263.77 370.19 633.96	-2.36		

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you lif this income is taxable and the IRS determines that it has not been reported.

02/23/2014 9006035238

T9004FFC4056108 001102 0001/0012 00



Form 8949 (2013)

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side.)

Wendy R. Davis

Social security number or taxpayer identification number

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) (E) Long-term transactions reported on Form(s) 1099-B, showing basis was not reported to the IRS

(F) Long-term transactions not reported to you on Form 1099-B

(i. / Long-term ti	ansactions not	reported to you	u on Form 1099-B				
(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see Column (e)	If you enter ar	if any, to gain or loss, n amount in column (g), ode in column (f), eparate instructions.	(h) Gain or (loss). Subtract column (e)
		(Mo., day, yr.)	(see instructions)	in the separate	(f) Code(s) from Instructions	(g) Amount of adjustment	from column (d) and combine the result with column (g)
See attached s							
	Various	Various	2,885	2,841	to	1	4
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		1					
2 Totals, Add the amounts in congative amounts). Enter each Schedule D, Ilne 8b (if Box D above is checked), or Ilne 10 (	total here and include above is checked). If	e on your ine 9 (if Box F	2 005	0.01			
loto if you obsolved Dove E	I DOX F SDOVE IS CIT	ecked)	2,885	2,841		1	45

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Social security number or taxpayer identification number

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side.)

Wendy R. Davis

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

**Note.** You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)

X (E) Long-term transactions reported on Form(s) 1099-B, showing basis was not reported to the IRS

(F) Long-term transactions not reported to you on Form 1099-B

(Mo., day, yr.) chedule Various	disposed (Mo., day, yr.)	(sales price) (see instructions)	and see Column (e) in the separate instructions	(f) Code(s) from	(g)	Subtract column (e) from column (d) and
	Various			instructions	Amount of adjustment	combine the result with column (g)
Various	Various	i				
		78,336	69,673			8,663
		·				
						<del>-</del>
					_	
-						
otal here and include bove is checked). If	e on your				-	
	ital here and includ bove is checked), I Box F above is ch	mns (d), (e), (g), and (h) (subtract tal here and include on your bove is checked), line 9 (if Box E Box F above is checked) ▶	otal here and include on your bove is checked), Ilne 9 (if Box E  Box F above is checked) ►	otal here and include on your bove is checked), line 9 (if Box E  Box F above is checked) ►	otal here and Include on your bove is checked), Ilne 9 (if Box E  Box F above is checked) ► 78,336 69,673	otal here and include on your . bove is checked), line 9 (if Box E

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Form **8949** 

Sales and Other Dispositions of Capital Assets

Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.

File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Attach

OMB No. 1545-0074

Attachment Sequence No. 12/

Department of the Treasury Internal Revenue Service Name(s) shown on return

Wendy R. Davis

Social security number or taxpayer identification number

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later. Short-Term. Transactions involving capital assets you held one year or less are short term. For long-term transactions, see page 2. Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a, you are not required to report these transactions on Form 8949 (see instructions). You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need. (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) (B) Short-term transactions reported on Form(s) 1099-B, showing basis was not reported to the IRS (C) Short-term transactions not reported to you on Form 1099-B Adjustment, if any, to gain or loss, If you enter an amount in column (g), (e) (h) enter a code in column (f). (c) (a) (d) Cost or other basis. (b) Gain or (loss). Date sold or See the separate instructions. Description of property Proceeds Date acquired See the Note below Subtract column (e) disposed (sales price) (Example: 100 sh. XYZ Co.) (Mo., day, yr.) and see Column (e) from column (d) and (Mo., day, yr.) (see instructions) in the separate combine the result Code(s) from Amount of Instructions with column (g) instructions adjustment See attached schedule Various Various 5.472 5,194 278 2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

5,194

5,472

Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked)

278



8	Part III Summary		Page 2
1	6 Combine lines 7 and 15 and enter the result		
	<ul> <li>If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line</li> <li>14. Then go to line 17 below.</li> </ul>	16	9,284
	<ul> <li>If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> </ul>		
	<ul> <li>If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22.</li> </ul>		
17	Are lines 15 and 16 both gains?		
•	Yes. Go to line 18.		
	No. Skip lines 18 through 21, and go to line 22.		
18	Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions	▶ 18	
19	Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the Instructions	<b>▶</b> 19	
20	Are lines 18 and 19 both zero or blank?	13	
	Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below.		
	No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of:		
	• The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500)	. 21 (	)
	Note. When figuring which amount is smaller, treat both amounts as positive numbers.		
22	Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?		
	Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42).		
	No. Complete the rest of Form 1040 or Form 1040NR.		

Schedule D (Form 1040) 2013

### SCHEDULE D (Form 1040)

### Capital Gains and Losses

▶ Attach to Form 1040 or Form 1040NR.

Department of the Treasury Internal Revenue Service (99) ▶ Information about Schedule D and its separate Instructions is at www.irs.gov/scheduled.

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074

2013 Attachment

Name(s) shown on return

Wendy R. Davis

_	
	Vaur analat annute
	Year social security number
799	
- 199	
	Control of the Contro

Part Chart Tarm On the Car				100000	
Short-Term Capital Gains ar	nd Losses – Assets	Held One Year or L	.ess		
lines below.  This form may be easier to complete if you round off cents to	(d) Proceeds	(e) Cost	(g) Adjustments		(h) Gain or (loss) Subtract column (e)
whole dollars.	(sales price)	(or other basis)	to gain or loss from Form(s) 8949, Part		from column (d) and combine the result with
1a Totals for all short-term transactions reported on Form			line 2, column (g)	**********	column (g)
1099-B for which basis was reported to the IRS and for	1				
which you have no adjustments (see instructions).					
However, if you choose to report all these transactions					
on Form 8949, leave this line blank and go to line 1b · · · · · ·					
1b Totals for all transactions reported on Form(s) 8949 with		<del></del>			
Box A checked	5,472	E 104			
2 Totals for all transactions reported on Form(s) 8949 with	5,412	5,194		0	278
Box B checked	1				
3 Totals for all transactions reported on Form(s) 8949 with					
Box C checked					
4 Short-term gain from Form 6353 and about town				-	
<ul> <li>Short-term gain from Form 6252 and short-term g</li> <li>Net short-term gain or (loss) from partnerships, S</li> </ul>	gain or (loss) from Forms	4684, 6781, and 8824		4	
6 Short-term capital loss carryover. Enter the amou	nt, if any, from line 8 of yo	ur Capital I ass Commen		5	
ANDIVIDUES III THE INSTRUCTIONS			1		
7 Net short-term capital gain or (loss). Combine!	lines 1a through 6 in colum	an /h\ lf b		6 (	
term capital gains or losses, go to Part II below. C	Otherwise, go to Part III on	the back	ng-		
				7	278
apital Callio allu	Losses – Assets He	eld More Than One	Year		
See instructions for how to figure the amounts to enter on the			(g)		
lines below.	(d) Proceeds	(e)	Adjustments		(h) Gain or (loss) Subtract column (e)
This form may be easier to complete if you round off cents to whole dollars.	(sales price)	Cost (or other basis)	to gain or loss from Form(s) 8949, Part II,		from column (d) and
			line 2, column (g)		combine the result with column (g)
Totals for all long-term transactions reported on Form					
1099-B for which basis was reported to the IRS and for					
which you have no adjustments (see Instructions).					
However, if you choose to report all these transactions					
on Form 8949, leave this line blank and go to line 8b					
Bb Totals for all transactions reported on Form(s) 8949 with					
Box D checked	2,885	2,841		1	45
9 Totals for all transactions reported on Form(s) 8949 with				+	<u> </u>
Box E checked	78,336	69,673		o	8,663
Totals for all transactions reported on Form(s) 8949 with				<del>-</del>  -	0,003
Box F checked					
1 Gain from Form 4797, Part I; long-term gain from F	orms 2439 and 6252; and	l long-term gain or (loss)		_	
				1	
2 Net long-term gain or (loss) from partnerships, S co			1	2	
			ı	$\top$	
Capital gain distributions. See the instructions	************************	*********		3	298
defice 1000 daily over. Enter the antount	if any from line 13 of you	or Combal I and Comment			
	in any, north line 15 of you	ii Capitai Loss Carryov	er	- 1	
Worksheet in the instructions  Net long-term capital gain or (loss) Combine line		-		4 (	)

9,006

Form W-2 Wage and Tax Statement	5073	T			,	
c Employer's name, address, and ZIP code	Void	7 Social security tips		1 Wages, lips, other cor	np. 2 Fee	deral income tax withheld 787.50
TEXAS SENATE PAYROLL OFFICE	-	8 Allocated tips		3 Social security wages 10159	4 So	cial security tax withheld
P. O. BOX 12068 AUSTIN TX 78711		9		5 Medicare wages and to 10159	ps 6 Me	629.89 dicare tax withheld 147.31
00101  e Employee's name address and 7/D and		10 Dependent care benef	fits	11 Nonqualified plans		5155.46
15000000000 WENDY R. DAVIS	Suff.	13 Salutory Redifferent Plan	Therd-party Suck pay	14 Other	12b	570.10
		b.Employer identification	number (EIN)		12c g DD	5742.84
	4		<b>-</b>		c12d	1
15 State Employer's state I.D. no. 16 S	tate wages, tips, etc.	17 State income tex	18 Loca	l wages, tips, etc.	19 Local income tax	20 Locality name
Copy B To Be Filed With Employee's FEDERA	Tay Datum					
Zinpoyoe ST EDERA		his information is being furr	nished to the I	nternal Revenue Service. 18 No. 1545-0008		Dept. of the Treasury - IRS Visit the IRS web Steet www.ins.gov/afile.

### AMT Version

Wendy R. Davis

1a Net loss plus prior year unallowed

b Net income from form or

loss from form or schedule

schedule

c Subtract line 1b from line 1a. If zero or less, enter -0-

Form 8582 (2013) Page 3 Worksheet 6-Allowed Losses (See instructions.) Form or schedule Name of activity and line number (a) Loss (b) Unallowed loss (c) Allowed loss to be reported on (see instructions) Rental property Sch E1 39,234 39,234 Total 39,234 39,234 Worksheet 7—Activities With Losses Reported on Two or More Forms or Schedules (See instructions.) Name of activity: (c) Ratio (d) Unallowed (e) Allowed loss loss Form or schedule and line number to be reported on (see instructions): 1a Net loss plus prior year unallowed loss from form or schedule b Net income from form or schedule c Subtract line 1b from line 1a. If zero or less, enter -0-Form or schedule and line number to be reported on (see instructions): 1a Net loss plus prior year unallowed loss from form or schedule b Net income from form or schedule \_\_\_\_\_ c Subtract line 1b from line 1a. If zero or less, enter -0-Form or schedule and line number to be reported on (see Instructions):

Form 8582 (2013)

1.00

Total

Wendy R. Davis



Form 8582 (2013)							Page
Caution: The worksheets must be Worksheet 1—For Form 8582, Li	filed with your tax	return	. Keep a cop	y for yo	ur records.		rage
To To The Town of the	1						
Name of activity		rent ye			rior years	Overal	l gain or loss
	(a) Net Income (line 1a)		(b) Net loss (line 1b)		Unallowed ss (line 1c)	(d) Gain	(e) Loss
		1		1			
Tabl Futer P		<u> </u>					
Total. Enter on Form 8582, lines 1a, 1b, and 1c	·						
Worksheet 2—For Form 8582, Lin		e instr					
Name of activ	ity		(a) Current deductions (			) Prior year deductions (line 2b	(c) Overall loss
Total. Enter on Form 8582, lines 2a and							
<sup>2b</sup> Worksheet 3—For Form 8582, Lin	es 3a 3h and 3c	. D	(netructions )				
	1	nt year		Pr	ior years	Overall	gain or loss
Name of activity	(a) Net income	(1	b) Net loss		inallowed		
Rental property	(line 3a)	<b> </b> -	(line 3b)	loss	(line 3c)	(d) Gain	(e) Loss
		ļ	13,691		25,543		39,234
Total. Enter on Form 8582, lines 3a, 3b,							
and 3c	16 am amazan 1 in 1		13,691		25,543		
Worksheet 4—Use this worksheet	Form or schedule	nown	on Form 85	82, line	<u>:10 or 14 (</u>	See instructions.	)
Name of activity	and line number to be reported on (see instructions)		(a) Loss	(b)	Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
<sub>otal</sub> Vorksheet 5—Allocation of Unallo	▶ Desco (Soci	inatru	otions )	1	.00		
And delication of Chance	wed Losses (See )		rm or schedule				
Name of activity		an to I	d line number be reported on e instructions)	(a)	Loss	(b) Ratio	(c) Unallowed loss
Rental property			Sch E1		39,234	1.0000	39,234
		1					
		+					
	<del></del>			1-12			

39,234

1.00

Form 8582 (2013)

Form **8582** 

Department of the Treasury

(99)

internal Revenue Service

AMT Version **Passive Activity Loss Limitations** 

See separate instructions.

Attach to Form 1040 or Form 1041.

Information about Form 8582 and its instructions is available at www.irs.gov/form8582.

Sequence No

identifying number Name(s) shown on return Wendy R. Davis 2013 Passive Activity Loss Part I Caution: Complete Worksheets 1, 2, and 3 before completing Part I. Rental Real Estate Activities With Active Participation (For the definition of active participation, see Special Allowance for Rental Real Estate Activities in the instructions.) 1a Activities with net income (enter the amount from Worksheet 1, column (a)) 1a **b** Activities with net loss (enter the amount from Worksheet 1, column 1b c Prior years unallowed losses (enter the amount from Worksheet 1, 1c column (c)) 1d d Combine lines 1a, 1b, and 1c Commercial Revitalization Deductions From Rental Real Estate Activities 2a Commercial revitalization deductions from Worksheet 2, column (a) 2a **b** Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b) c Add lines 2a and 2b 2c **All Other Passive Activities** 3a Activities with net income (enter the amount from Worksheet 3, b Activities with net loss (enter the amount from Worksheet 3, column 13,691 3b c Prior years unallowed losses (enter the amount from Worksheet 3, 25,543 column (c)) -39,234d Combine lines 3a, 3b, and 3c ... 3d Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used -39,234 If line 4 is a loss and: 
• Line 1d is a loss, go to Part II. • Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III. • Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15. Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II or Part III. Instead, go to line 15. Special Allowance for Rental Real Estate Activities With Active Participation Part II Note: Enter all numbers in Part II as positive amounts. See instructions for an example. 5 5 Enter the smaller of the loss on line 1d or the loss on line 4 6 Enter \$150,000. If married filing separately, see instructions 7 Enter modified adjusted gross income, but not less than zero (see instructions) 0 Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8. Subtract line 7 from line 6 9 Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions 9 Enter the smaller of line 5 or line 9 If line 2c is a loss, go to Part III. Otherwise, go to line 15. Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities Part III Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the Instructions. Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions 11 11 Enter the loss from line 4 12 12 Reduce line 12 by the amount on line 10 13

**Total Losses Allowed** 

Add the income, if any, on lines 1a and 3a and enter the total

Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13

instructions to find out how to report the losses on your tax return .....

Total losses allowed from all passive activities for 2013. Add lines 10, 14, and 15. See

14

15

16

13

Part IV

Wendy R. Davis

c Subtract line 1b from line 1a. If zero or less, enter -0-

Form 8582 (2013)



Worksheet 6—Allowed Losses (See instructions.) Page 3 Form or schedule Name of activity and line number (b) Unallowed loss (a) Loss (c) Allowed loss to be reported on (see instructions) Rental property Sch E1 39,234 39,234 Total 39,234 39,234 Worksheet 7—Activities With Losses Reported on Two or More Forms or Schedules (See instructions.) Name of activity: (a) (b) (c) Ratio (d) Unallowed (e) Allowed loss Form or schedule and line number loss to be reported on (see instructions): 1a Net loss plus prior year unallowed loss from form or schedule b Net income from form or schedule c Subtract line 1b from line 1a. If zero or less, enter -0-Form or schedule and line number to be reported on (see instructions): 1a Net loss plus prior year unallowed loss from form or schedule **b** Net income from form or schedule c Subtract line 1b from line 1a. If zero or less, enter -0-Form or schedule and line number to be reported on (see instructions): 1a Net loss plus prior year unallowed loss from form or schedule b Net income from form or schedule

Form 8582 (2013)

1.00

Total .



Page 2

Form **8582** (2013)

Form 8582 (2013) Caution: The worksheets must be filed with your tax return. Keep a copy for your records.

Worksheet 1-For Form 8582, Lines 1a, 1b, and 1c (See instructions.) Current year Prior years Overall gain or loss Name of activity (a) Net income (b) Net loss (c) Unallowed (d) Gain (line 1a) (e) Loss (line 1b) loss (line 1c) Total. Enter on Form 8582, lines 1a, 1b, Worksheet 2-For Form 8582, Lines 2a and 2b (See instructions.) (a) Current year Name of activity (b) Prior year (c) Overall loss deductions (line 2a) unallowed deductions (line 2b) Total. Enter on Form 8582, lines 2a and Worksheet 3—For Form 8582, Lines 3a, 3b, and 3c (See instructions.) Current year Prior years Overall gain or loss Name of activity (a) Net income (b) Net loss (c) Unallowed (d) Gain (line 3a) (e) Loss (line 3b) loss (line 3c) Rental property 13,691 25,543 39,234 Total. Enter on Form 8582, lines 3a, 3b, and 3c 13,691 <u>25,543</u> Worksheet 4—Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.) Form or schedule Name of activity and line number (d) Subtract (c) Special (a) Loss (b) Ratio to be reported on column (c) from allowance (see instructions) column (a) 1.00 Worksheet 5-Allocation of Unallowed Losses (See instructions.) Form or schedule Name of activity and line number (a) Loss (b) Ratio (c) Unallowed loss to be reported on (see instructions) Rental property Sch E1 39,234 1.0000 Total 39,234 1.00 39,234

Form 8582

Department of the Treasury

**Passive Activity Loss Limitations** 

See separate instructions.

Attach to Form 1040 or Form 1041.

▶ Information about Form 8582 and its instructions is available at www.irs.gov/form8582

OMB No. 1545-1008

identifying number

Sequence No

Internal Revenue Service Name(s) shown on return

Wendy R. Davis 2013 Passive Activity Loss

Caution: Complete Worksheets 1, 2, and 3 before completing Part I. Rental Real Estate Activities With Active Participation (For the definition of active participation, see Special Allowance for Rental Real Estate Activities in the instructions.) 1a Activities with net income (enter the amount from Worksheet 1, b Activities with net loss (enter the amount from Worksheet 1, column 1a c Prior years unallowed losses (enter the amount from Worksheet 1, 1b column (c)) d Combine lines 1a, 1b, and 1c 1c 1d Commercial Revitalization Deductions From Rental Real Estate Activities 2a Commercial revitalization deductions from Worksheet 2, column (a) 2a b Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b) c Add lines 2a and 2b 2c All Other Passive Activities 3a Activities with net income (enter the amount from Worksheet 3, 3a b Activities with net loss (enter the amount from Worksheet 3, column c Prior years unallowed losses (enter the amount from Worksheet 3, 13,691 column (c)) 25,543 d Combine lines 3a, 3b, and 3c Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with -39,234

- your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used If line 4 is a loss and: • Line 1d is a loss, go to Part II.
  - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
  - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II or Part III. Instead, go to line 15. Part II

	an II Special Allowance for Rental Real Estate Activities With	Active Dor	laination			
	Note: Effect all numbers in Part II as positive amounts. See instructions to	r an evennie	iicipation			
5	Enter the smaller of the loss on line 1d or the loss on line 4	or an example.			Г	
6	Enter \$150,000. If married filing separately, see instructions	161		<del></del>		***
7	Enter modified adjusted gross income, but not less than zero (see instructions)	7				
	risto. If the 7 is greater than or equal to line 6, skip lines 8 and 9.		<u> </u>			
	enter -0- on line 10. Otherwise, go to line 8.					
8	Subtract line 7 from line 6	g l				
9	Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separate	ely sociantered	lawa	*****	*******	
4 n	The state of the s	ely, see msuuci	ions	9	ı	

Enter the smaller of line 5 or line 9

occurrence of	If line 2c is a loss, go to Part III. Otherwise, go to line 15.		
	Special Allowance for Commercial Revitalization Deductions From Rental Revitalization Deductions From Rental Revitalization Deductions From Rental Revitalization Deductions From Rental Revitations	eal Estate Activit	ies
11 12	Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11	
13	Enter the loss from line 4  Reduce line 12 by the amount on line 10		
14	Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13	13	
	Total Losses Allowed	14	
15 16	Add the income, if any, on lines 1a and 3a and enter the total	15	
	Total losses allowed from all passive activities for 2013. Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16	,

For Paperwork Reduction Act Notice, see instructions.

-39,234

8960

Department of the Treasury

### Net Investment Income Tax— Individuals, Estates, and Trusts

Attach to Form 1040 or Form 1041.

OMB No. 1545-2227

Internal Revenue Service (99)

▶ Information about Form 8960 and its separate instructions is at www.irs.gov/form8960. Name(s) shown on Form 1040 or Form 1041 Your social security number or EIN Wendy R. Davis Part I **Investment Income** Section 6013(g) election (see instructions) Regulations section 1.1411-10(g) election (see instructions) Taxable interest (Form 1040, line 8a; or Form 1041, line 1) 1 Ordinary dividends (Form 1040, line 9a; or Form 1041, line 2a) 1 2 Annuities from nonqualified plans (see instructions) 3,958 3 4a Rental real estate, royalties, partnerships, S corporations, trusts, etc. (Form 1040, line 17; or Form 1041, line 5) b Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see Instructions) 4b -89,411 c Combine lines 4a and 4b 4c 317 5a Net gain or loss from disposition of property from Form 1040, combine lines 13 and 14; or from Form 1041, combine lines 4 and 7 5a 9,284 b Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions) 5b c Adjustment from disposition of partnership interest or S corporation stock (see instructions) бc Combine lines 5a through 5c Changes to investment income for certain CFCs and PFICs (see instructions) 9,284 Other modifications to investment income (see instructions) Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7. 13,567 8 Part II Investment Expenses Allocable to Investment Income and Modifications Investment interest expenses (see instructions) 9a 9a State income tax (see instructions) b 9b Miscellaneous investment expenses (see instructions) C 417 Add lines 9a, 9b, and 9c 9d 417 Additional modifications (see instructions) Total deductions and modifications. Add lines 9d and 10 417 Tax Computation 12 Net investment income. Subtract Part II, line 11 from Part I, line 8. Individuals complete lines 13-17. Estates and trusts complete lines 18a-21. If zero or less, enter -0-13,150 13 Modified adjusted gross income (see instructions) 13 14 Threshold based on filing status (see instructions) 200,000 15 Subtract line 14 from line 13. If zero or less, enter -0-16 Enter the smaller of line 12 or line 15 13,150 16 17 Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and on Form 1040, line 60 500 18a Net investment income (line 12 above) **b** Deductions for distributions of net investment income and deductions under section 642(c) (see instructions) 18b c Undistributed net investment income. Subtract line 18b from 18a (see instructions) 18c 19a Adjusted gross income (see instructions) b Highest tax bracket for estates and trusts for the year (see instructions)\_\_\_\_\_ c Subtract line 19b from line 19a. If zero or less, enter -0-20 Enter the smaller of line 18c or line 19c 20 21 Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (.038). Enter here and on Form 1041, Schedule G, line 4 .....

For Paperwork Reduction Act Notice, see your tax return instructions.

Form

Internal Revenue Service

**Additional Medicare Tax** 

 $\blacktriangleright$  If any line does not apply to you, leave it blank. See separate instructions. ▶ Attach to Form 1040, 1040NR, 1040-PR, or 1040-SS.

▶ Information about Form 8959 and its instructions is at www.irs.gov/form8959.

Name(s) shown on Form 1040

	Wendy R. Davis			You	ır social se	curity number
	Part I Additional Medicare Tax on Medicare Wages					
	1 Medicare wages and tips from Form W-2, box 5. If you have		T	· · · · · · · · · · · · · · · · · · ·	18888888	
	more than one Form W-2, enter the total of the amounts					
	from box 5		1 1	10 160		
	2 Unreported tips from Form 4137, line 6		1	10,160	4	
	5 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -		3			
	The mas Tanodgi O		4	10,160		
	Enter the following amount for your filing status:	• • • • • • • • • • • • • • • • • • • •				
	Married filing jointly \$2	50,000				
	Married filing separately	25,000				
	\$20 striple, ricad of household, of Qualifying Widow(er)	00,000	5	200,000		
	Subtract line 5 from line 4. If the result is zero or less, enter +0-				6	(
	. Fite model are fax of wedleare wages. Multiply line 6 by 0.9% (.009). Ente	r here a	nd			
8	go to Part II  Part II  Additional Medicare Tax on Self-Employment Incom			************	7	
	Part II Additional Medicare Tax on Self-Employment Incom 8 Self-employment income from Schedule SE (Form 1040),	1e				
	Section A, line 4, or Section B, line 6. If you had a loss, enter					
	-0- (Form 1040-PR and Form 1040-SS filers, see Instructions.)					
,	Enter the following amount for your filling status:		8	222,943		
	Married filing jointly					
	Married filing jointly \$25  Married filing separately \$12	0,000				
	Single, Head of household, or Qualifying widow(er) \$20	0.000		200 000		
10	r Lines the amount from line 4	i i	9	200,000		
			10	10,160		
	. Odbitact little 11 from line 8. If the result is zero or less, enter -0-			189,840		22 100
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (.00				12	33,103
-	nere and go to Part III				13	200
-	Part III Additional Medicare Tax on Railroad Retirement Tax	Act (F	RTA)	Compensation	13	298
14	Railroad retirement (RRTA) compensation and tips from	T				· · · · · · · · · · · · · · · · · · ·
	Form(s) W-2, box 14 (see instructions)		14			
15	Enter the following amount for your filing status:					
	Married filing songestable \$250	0,000				
	\$125	5,000				
10	angle, ricad of floaschold, of Challytha withwith	0,000 [	15	200,000		
17	Subtract line 15 from line 14. If zero or less, enter -0-				16	0
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line	16 by				
	6.9% (.009). Enter here and go to Part IV  Art IV Total Additional Medicare Tax				17	
-	Add lines 7, 13, and 17. Also include this amount on Form 1040, line 60, (Form 1040)	10115				
	1040-PR, and 1040-SS filers, see instructions) and go to Part V	40NR,		·		
	an V Withholding Reconciliation				18	298
19	Medicare tax withheld from Form W-2, box 6. If you have	· ·			*****	
	more than one Form W-2, enter the total of the amounts					
	from box 6		19	147		
20	Enter the amount from line 1		20	10,160		
	Multiply line 20 by 1.45% (.0145). This is your regular	·····		10/100		
	Medicare tax withholding on Medicare wages	1:	21	147		
22	Subtract line 21 from line 19. This is your Additional Medicare Tax withholding on M	ledicare		/		
	wages			2	22	0
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation fr	om Forn	n			<u> </u>
	W-2, box 14 (see instructions)			1 2	23	
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include the	is				
	amount with federal income tax withholding on Form 1040, line 62 (Form 1040NR, 1	1040-PR	i,			
F	and 1040-SS filers, see instructions)				24	



Page 2

If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  Enter the smaller of line 36 or line 39  Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax Works	ne amount from		nstructions.
Complete Part III only if you are required to do so by line 31 or by the Foreign 36 Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the line 3 of the worksheet in the instructions for line 31 37 Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax  Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  8 Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  9 If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  10 Enter the smaller of line 36 or line 39  Subtract line 40 from line 36  2 If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  2 \$72,500 if married filing jointly or qualifying widow(er), 2 \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 4 of the Schedule D Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 4 of the Schedule D Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 4 of the Schedule D Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 4 of the	amount from	36	
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If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  Enter the smaller of line 36 or line 39  Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax Works			
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enter the smaller of that result or the amount from line 10 of the Schedule D  Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  Enter the smaller of line 36 or line 39  Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Farms)			
Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter  Enter the smaller of line 36 or line 39  Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Sch			
Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax Worksheet in the ins			
Subtract line 40 from line 36  If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax Worksheet in the ins	39	12,680	
If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the Enter:  \$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax Wo		40	12,6
Enter:  \$72,500 if married filing jointly or qualifying widow(er),  \$36,250 if single or married filing separately, or  \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax  Worksheet in the instructions for Form 1040, line 44, or the amount from line  14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Forms)			185,1
\$72,500 if married filing jointly or qualifying widow(er), \$36,250 if single or married filing separately, or \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Farmer)	26% (.26). Otherv	vise,	
\$36,250 if single or married filing separately, or     \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Forms)	ne result	▶ 42	48,25
\$36,250 if single or married filing separately, or     \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Forms)			250-101-110
e \$48,600 if head of household.  Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax  Worksheet in the instructions for Form 1040, line 44, or the amount from line  14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Forms)		_	
Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax	3	36,250	
14 of the Schedule D Tax Worksheet in the instructions for Schedule D Tax			
14 of the Schedule D Tax Worksheet in the instructions for Schedule D /Form			
1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form			
1040, line 43; but do not enter less than -0-	4 17	9,984	
Subtract line 44 from line 43. If zero or less, enter -0-	5	0	
Enter the smaller of line 36 or line 37	6 1	2,680	
Enter the smaller of line 45 or line 46. This amount is taxed at 0%	7		
Subtract line 47 faces line 40			
Subtract line 47 from line 46	1.	<u>2,680</u>	
Enter the amount from the Line 49 Worksheet in the instructions 49	22	0,016	
Enter the smaller of line 48 or line 49  Multiply line 50 by 15% (15)	)  1.	2 <b>,</b> 680	
Multiply line 50 by 15% (.15)		🕨 51	1,90
Add lines 47 and 50  If lines 52 and 36 are the same, skip lines 53 through 57 and go to line 58. Otherwise, go	1.	2,680	
Subtract line EO from the 10	•		
Multiply line 53 by 20% (.20)		0	
If line 38 is zero or blank, skip lines 55 through 57 and go to line 58. Otherwise, go to lin	pa pa	<b>▶</b> 54	
Add lines 41 52 and 53	. [		
Subtract line 55 from line 36  Multiply line 56 by 35% ( 25)		<del></del>	
Multiply line 56 by 25% (.25) Add lines 42, 51, 54, and 57			
Add lines 42, 51, 54, and 57 f line 36 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 36 by 20	•••••	57	EO 151
			50,153
Otherwise, multiply line 36 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separatel		1 1	
Enter the smaller of line 58 or line 59 here and on line 31. If you are filing Form 2555 or 2555-	v) from the result	En	51 001
enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for I	v) from the result	59	51,801

### Alternative Minimum Tax—Individuals

▶ Information about Form 6251 and its separate instructions is at www.irs.gov/form6251.

OMB No. 1545-0074

32

Attach to Form 1040 or Form 1040NR.

Department of the Treasury Internal Revenue Service Name(s) shown on Form 1040 or Form 1040NR

Attachment Sequence No. Your social security number

Wendy R. Davis  Part I Alternative Minimum Taxable Income (See instructions for how to complete each  1 If filing Schedule A (Form 1040) enter the amount for 5	Tour social se	curity number
Taxable filedine (See instructions for now to complete each		
1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)  2 Medical and dental. If you or your spouse was 65 or older, enter the amount from Form 1040, line 38, and go to line 7.		
2 Medical and dental. If you or your spouse was 65 or older, enter the smaller of Schedule A (Form 1040),	1	<u>196,564</u>
line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-  Taxes from Schedule A (Form 1040), line 9		
3 Taxes from Schedule A (Form 1040), line 9	2	
4 Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line  5 Miscellaneous deductions from Schedule A (Form 1040) line 67	3	25,873
5 Miscellaneous deductions from Schedule A (Form 1040) line 6 of the worksheet in the instructions for this line	4	0
5 Miscellaneous deductions from Schedule A (Form 1040), line 27 6 If Form 1040, line 38, is \$150,000 or less, enter -0. Otherwise, see instructions	5	417
7 Tay refund from Form 1040 Page 40	16 k	
8 Investment interest expense (difference between regular tay and AMT)	7 (	
8 Investment interest expense (difference between regular tax and AMT) 9 Depletion (difference between regular tax and AMT)	8	
9 Depletion (difference between regular tax and AMT)  10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	9	
10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount  11 Alternative tax net operating loss deduction	10	
11 Alternative tax net operating loss deduction  12 Interest from specified private activity bonds exempt from the regular tax	11 (	
12 Interest from specified private activity bonds exempt from the regular tax  13 Qualified small business stock (7% of gain excluded under section 1202)	12	6
13 Qualified small business stock (7% of gain excluded under section 1202)  14 Exercise of incentive stock options (excess of AMT income ever regular for income)	13	<u> </u>
14 Exercise of incentive stock options (excess of AMT income over regular tax income)  15 Estates and trusts (amount from Schedule K-1 (Form 1041), how 13 goods AMT income)	14	
15 Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)  16 Electing large partnerships (amount from Schedule K-1 (Form 1065 B), box 6)	15	
16 Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)  17 Disposition of property (difference between AMT and regular tox gain an local)	16	
17 Disposition of property (difference between AMT and regular tax gain or loss)  18 Depreciation on assets placed in service after 1986 (difference between AMT)	17	
18 Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)  19 Passive activities (difference between AMT and regular tax in a service activities)	18	
		0
20 Loss limitations (difference between AMT and regular tax income or loss)  21 Circulation costs (difference between regular tax and AMT)	20	Ŏ
21 Circulation costs (difference between regular tax and AMT)  22 Long-term contracts (difference between AMT and regular tax income)	21	
22 Long-term contracts (difference between AMT and regular tax income)  23 Mining costs (difference between regular tax and AMT)	22	
23 Mining costs (difference between regular tax and AMT) 24 Research and experimental costs (difference between regular tax and AMT)	23	
24 Research and experimental costs (difference between regular tax and AMT)  25 Income from certain installment sales before January 1, 1987	24	
	25 (	\
26 Intangible drilling costs preference 27 Other adjustments, including income-based related adjustments.	26	
	27	
the district modifier Combine lines I (fillough Z/, (If married filling separately and line		
20 10 Hore than \$230,350, see instructions.)	28	222,860
Part II Alternative Minimum Tax (AMT)		222,000
29 Exemption. (If you were under age 24 at the end of 2013, see instructions.)		
IF your filing status is AND line 28 is not over THEN enter on line 29		
Single or nead or nousehold \$115,400 \$51,000		
Matried fining jointly of qualifying widow(er) 153,900 80,800		
Warried hing separately 76,950 40,400	29	25 <b>,</b> 035
If line 28 is over the amount shown above for your filing status, see instructions		23,033
30 Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33		
and 55, and go to line 34	30	197,825
" you die hing runt 2000 of 2000-EZ. See Instructions for the amount to enter	00	191,025
If you reported capital gain distributions directly on Form 1040, line 13: you reported qualified divided to a Form 1		
1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 60 here.		
All others: If line 30 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line	31	50 152
30 by 20% (.20). Otherwise, multiply line 30 by 28% (.28) and subtract \$3.590 (\$1.795 if married	31	50,153
filing separately) from the result.		
_1	32	ာ
32 Alternative minimum tax foreign tax credit (see instructions)	1 26 1	5
32 Alternative minimum tax foreign tax credit (see instructions) 33 Tentative minimum tax. Subtract line 32 from line 31	22	50 150
	33	50,150
Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Schedule J to figure your tax, the amount from line 44 of Form 1040 must be refigured.	33	50,150
Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Schedule J to figure your tax, the amount from line 44 of Form 1040 must be refigured.	33	
Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040	33	50,150 45,588 4,562

15 include this amount on line 4b above

Nonfarm Optional Method. You may use this method only if (a) your net nonfarm profits<sup>3</sup> were less than \$5,024 and also less than 72.189% of your gross nonfarm income, 4 and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. Caution. You may use this method no more than five times. 16 Subtract line 15 from line 14

Enter the smaller of: two-thirds (2/3) of gross nonfarm income4 (not less than zero) or the

amount on line 16. Also include this amount on line 4b above ... <sup>1</sup> From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.

<sup>3</sup> From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.

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<sup>&</sup>lt;sup>2</sup> From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A — minus the amount you would have entered on line 1b had you not used the optional method.

<sup>&</sup>lt;sup>4</sup> From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

	Passive Incom	e and Loss	Monnagha		
	(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	Nonpassive Incon  (e) Deduction or loss from Schedule K-1	(f) Other income from	
A			Noni Schedule K-1	Schedule K-1	
в					
34a	Totals				
b	Totals				
35	Add columns (d) and (f) of line 34a			05	<b>***</b>
36	Add columns (c) and (e) of line 34b		***************************************	35	
37	Total estate and trust income or (los	s). Combine lines 35 and 36. Enter the	result here and	36 (	
	include in the total on line 41 below	The same with the same of the same same same same same same same sam	result liefe affu		
P	include in the total on line 41 below Income or Loss From	Real Estate Mortgage Investm	nent Conduits (REMICs)—Resid	37	
		. Tour mother mortgage myesur	ient conduits (REMICS)—Resid	dual Holder	

(c) Excess inclusion from 38 (b) Employer (a) Name (d) Taxable income (net loss) from Schedules Q, line 1b identification number Schedules Q, line 2c (e) income from Schedules Q, line 3b (see instructions) Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below 39 Part V Summary Net farm rental income or (loss) from Form 4835. Also, complete line 42 below 40 40 Total Income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18 41 41 89. Reconciliation of farming and fishing income. Enter your gross 42 farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code

42

43

V; and Schedule K-1 (Form 1041), box 14, code F (see instructions) Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules

DAA



### 2013 TAX REPORTING WENDY R DAVIS

Account No.
Recipient ID No.

STATEMENT Customer Service: 800-33
Payer's Fed ID Number: 800-333-

FORM 1099-B\*

2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis <u>is not reported</u> to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II PSI ON BIND JUNGUASE IN BIND JEW

(IRS Form 1099-B box numbers are shown below in bold type)

			July Xnd Geen 100	Ders are shown below in				
8 Description, 1d Sto	8 Description, 1d Stock or Other Symbol, CUSIP				bota type)			
Action 1a Date of Sale or Exchange	of 1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks,	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale	4 Federal	<u>ਛੋ</u>
DELAWARE VALUE	DELAWARE VALUE FD CL A, DDVAX, 24610C881	.881				Disallowed	St.	
Sale 01/29/13	09/29/10	171.218	2 258 36	}				8
Sale 04/12/13	09/29/10	77.327	1,093.40	738.24	623.81			
Subtotals	# P E E E E E E E E E E E E E E E E E E		3,361.76	2.379 76	355.19			
DOUBLELINE TOTAL	DOUBLELINE TOTAL RT BOND FD CL N, DLTNX, 258620202	NX, 258620202	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0177104	; ; ; ; ; ; ; ; ; ; ; ; ; ;	1		
Sale 01/29/13	various	235.207	2.674.30			; ; ; ; ; ; ;	, , , , , , , , , , , , , , , , , , , ,	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Sale 04/12/13	various	84.089	957.79	2,012.38	61.92			
Subtotals	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		3,632.09	3,546.34	23.83			
Sale 01/29/13	DRIEHAUS ACTIVE INCOME FUND, LCMAX, 262028855 Sale 01/29/13 08/26/11 102	102.000	1 008 57		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1	1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Sale 04/12/13	various	17.608	189.28	1,069.90	28.64			
oubtotals	, , , , , , , , , , , , , , , , , , , ,		1,287.82	1,254.60	1.00			
FIDELITY INTER MEC	FIDELITY INTER MEDIATE MUNI INCOME, FLTMX, 31638R204	TMX, 31638R204	1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	: : : : : : : : : : : : : : : : : : :		
Sale 01/29/13	09/29/10	607.569	. 6,476.69	8 326 A0			3 9 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Sale 02/15/13	09/29/10	6.000	. ස.90	67.48	150.29			
Sale 04/12/13	various	199.671	2,130.49	2,079,10	1.42			
1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	8,671.08	8,467.98				
Sale 01/29/13	Sale 01/29/13 various 227.216	CL, TXRSX, 4812A254 227.216	6 2.390.31		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	. !	1 1 1 1
Sale 04/12/13	05/10/11	107.102	1.121.36	4,270.31	114.00			
Sale 06/06/13	various	19.038	194.58	10,4.3/	48.39	•		
Subtotals		•	700.00	190.72	3.86			
* This is important to i	* This is important tay in the state of the		; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	00.000	1			
I XEL MELLOCHER CI CHEL	niormation and is being	irniched to the inte				*************		,

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you

02/23/2014 9006035238



## 2013 TAX REPORTING STATEM

Account No.
Recipient ID No.

Customer Service: ayer's Fed ID Number: 

FORM 1099-B

8 Description, 1d Stock or Other Symbol, CUSIP

2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II COPY B for Recipient OWB NO 152

(IRS Form 1099-B box numbers are shown below in bold type)

	-8.66 381.64 211.70 56.16	982.34 1,759.28 752.59 2,511.87 843.84	<u>u</u> 10	MFS INTERNATIONAL VALUE FUND CL A, MGIAX, 55273E301 Sale 01/29/13 09/29/10 75.491 Sale 04/12/13 various 32.294 Subtotals  MORGAN STANLEY GLOBAREAL ESTATE PORT P, MRLBX, 61744J135 Sale 01/29/13 05/10/11 90.909 Sale 02/15/13 various 15.697	DBAREAL ESTATE PO 05/10/11 various	01/29/13 02/15/13	MORGAN Sale
	-8.66 381.64 211.70	982.34 1,759.28 752.59 2,511.87	دم دي	IGIAX, 55273E301 75.491 32.294 ORT P, MRLBX, 61744J13 90.909	DBAREAL ESTATE PO 05/10/11	STANLEY GLC 01/29/13	MORGAN S Sale
	-8.66 381.64 211.70	982.34 1,759.28 752.59 2,511.87	در دی	IGIAX, 55273E301 75.491 32.294 ORT P, MRLBX, 61744J1;	)BAREAL ESTATE PI	STANLEY GLO	MORGAN :
	-8.66 381.64 211.70	982.34 1,759.28 752.59 2,511.87	<u>u</u> 10	IGIAX, 55273E301 75.491 32.294	4 6 1 9 8 6 7 6 1 6 1 6 1 6 1 6 1 7 6 1 7 6 1 7 7 7 7	;	
	-8.66 	982.34 1,759.28 752.59	<b>923.61</b> 2,140.92 964.29	IGIAX, 55273E301 75.491 32.294			
	-8.66 381.64	982.34 1,759.28	<b>923.61 924.61 924.61 925.61</b>	1GIAX, 55273E301 75.491			Subtotale
	-8.66	982.34	<b>923.61</b> 2.140.92	IGIAX, 55273E301 75.491	various	04/12/13	Sale
	-8.66 66	982.34	923.61		09/29/10 CLA, M	01/29/13	Sale
	-8.66			, , , , , , , , , , , , , , , , , , , ,			
		110.85	102.19	5			Subtotals
	-50.07	8/1.49	34.120	8 /87	various	04/12/13	Sale
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	<b>?</b>	891 43	Sale 01/29/13 08/26/11 66.728	08/26/11	01/29/13	Sale
		1,770.97	1,760,86	1 1 2 2 1 1 2 2 1 1 1 1 1 1 1 1 1 1 1 1			
	4.99	821.45					Subtotals
	-5.12	90.JZ	816.46	51.839	various	02/15/13	Sale
	ı	0.40 50	944.40	59.924	various	01/29/13	Sale
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		C 589509108	MERGER FUND, MERFX, 589509108	MERGER I
	40.02	830.05	938.25		1 2 2 1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1	! ! ! ! ! ! ! ! ! ! ! ! ! ! ! ! ! ! !	Subtotals
	AS 65	253.38	300.00	50.167	Various	04/12/13	) dia
	61 78	576.67	638.25	114.177	09/29/10	01/29/13	Sale
Disallowed Withheld W				317609816	LISTED PRIVATE EQUITY CLASS A, LPEFX, 317609816	RIVATE EQUIT	LISTED PF
4 Federal	Gain/Loss (-)	3 Cost or Other Basis (b)	of Stocks, Bonds, etc. (a)	Sold	Acquisition	Sale or Exchange	

This is important tax information and is being furnished to the internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you

02/23/2014 9006035238

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Marie Control



## 2013 TAX REPORTING Account No. Account ID No.

ustomer Service: 800-333-

Copy B for Recipient OWB NO 154:

### FORM 1099-B

# 2013 Proceeds from Broker and Barter Exchange Transactions

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(IRS Form 1099-B box numbers are shown below in bold type)

				Street and strong perow in	プンプス オラシン			
8 Description, 1d Stock or Other Symbol, CUSIP	or Other Symbol, CUSI				many)			
Action 1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks,	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale		7
NORTHERN INTERMED TAX EXEMPT FUND, NOITX, 665162871	TAX EXEMPT FUND	, NOITX, 665162871	(w)			Disallowed	Withheld State	€
Sale 01/29/13	various	610.567	6.569.70	6 460 97				
Sale 02/15/13	10/18/10	12,000	129.00	126.65	108.83			
Sale 04/12/13	various	266.752	2.875.59	2 02.02	2.02	_		
Sale 10/10/13	various	13.025	134 29	427 00	52.88			
Subtotals			9 708 59	. 137.02	3.53	0.27		
RIDGEWORTH MID CAP VALUE FOLLITY OLD SWATTY TESTSTORE	VALUE FOURTY CI	SINTY TESSES	86.807,6	9,548,38	* : : : : : : : : : : : : : : : : : : :	0.27		
Sale 01/29/13	09/29/10	131.475	1 651 37				1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1
Sale 04/12/13	various.	56.256	739 20	1,434.04	216.48			
Subtotals			2,390.52	2,048.78	07.621			
RNOR	PPORTUNITY FUND	, RNCOX, 76881N103		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	· · · · · · · · · · · · · · · · · · ·	,
Sale 01/29/13	09/29/10	173.426	2,103.66	1.953.02	450.02			
Sale 04/12/13	various	79.191	981.18	891.80	86.58 86.59			
ouptotats	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	3,084.84	2,844.82				
RS GLOBAL NATURAL RESOURCES CL A, RSNRX, 74972H705	RESOURCES CL A, R	SNRX, 74972H705	1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Sale 01/29/13	various	38.618	1,457.82	1.458.49	}			1
Sale 04/12/13	05/10/11	19.331	732.83	730 08	5.57 7.57			
Sale 06/06/13	various	4.980	189.35	12000	2/3			
Subtotals			2,380.00	2-376.65	1.2/			
SPARTAN 500 INDEX FDADVANTAGE CLASS, FUSVX, 315911701	DADVANTAGE CLASS	, FUSVX, 315911701	, , , , , , , , , , , , , , , , , , ,	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	# # # # # # # # # # # # # # # # # # #	1
Sale 01/29/13	various	40.793	2,179.56	1.676.40				
Sale 04/12/13	08/26/11	19.054	1,072.93	783.05	289,88			
I his is important tax information and is being furnished to the Internal Revenue Service. If you	rmation and is being	furnished to the interna	al Revenue Service If					

if this income is taxable and the IRS determines that it has not been reported.



# 2013 TAX REPORTING

WENDY R DAVIS

Account No.
Recipient ID No.

STATEMENT ustomer Service: 80 Payer's Fed ID Number:

### FORW 1099-B\*

# 2013 Proceeds from Broker and Barter Excliange Transactions

Long-term transactions for which basis is <u>not reported</u> to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(IRS Form 1099-B box numbers are shown below in bold type)

				Day	This is important tax information and is being furnished to the internal b	ormation and is be	portant tax into	11151511
		24.32	422.78	447.10	34,156	118-2110		* 1
		18.64	739.16	/5/.80	39.7.10	2244	04/12/13	Sale .
	٠		•		59 716	01/24/11	01/29/13	Sale
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 2 2 2 3 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	TOUCHSTONE FOCUSED EQUITY FUND CLASS A. 89155T888	ED EQUITY FUND	TONE FOCUSE	TOUCHS
	1	-170.58	972.04	801.46	30.790	Sale 01/08/13 05/10/11 30.75	01/08/13	Sale
			CO. 1 P. C.	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		WITE OF ACC AT TO	מון המשקח וומ	TCW SM
	•		3	3,581.43	٠			Subtotals
		A27 06	875.87	1,302.93	93,333	09/29/10	04/12/13	vale
1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2		840 FO	1,635.98	2,278.50	174.331	09/29/10	01/29/13	Sale
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	GIGX, 87234N518	TCW DIVIDEND FOCUSED FUND CL N, TGIGX, 87234N518	IDEND FOCUS	TCW DIV
			2,418.91	2,436.23				
	٠	0.39	56.30°	56.69	0.020			Subfotals
		. 4.81	/08.95	7 10,70	3 808	12/21/11	06/06/13	Sale
		0.23	70.03	713 76	48.194	various	04/12/13	Sale
٠			78 80	59.12	4.003	05/10/11	02/15/13	Oale
		11 89	1,594.77	1,606.66	108.412	05/10/11	01/29/13	200
	1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1	T ROWE PRICE INTL STOCK ADVISOR CL, PAITX, 77956H823	TOCK ADVISOR C	PRICE INTL S	T ROWE
			3,393.63	4,708.45	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
		476.88	1,112.37	1,589.25	G20.60			Septotale
		837.94	4,261.25	4 700 07	30 000	09/29/10	04/12/13	Sale
				3.119.20	80.041	09/29/10	01/29/13	Sale
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	T ROWE PRICE GROWTH STOCK ADVISOR CL, TRSAX, 741479208	TH STOCK ADVIS	PRICE GROW	T ROWE
			2,499,70	3,311.22		4 1 1 1 1 1 1 1 1 1	1 t. 1 t. 1 t. t. t.	Signording
		18 50	40.23	58.73	0.979	08/26/11	10/10/13	Sale
	Disallowed				SPARTAN 500 INDEX FDADVANTAGE CLASS, FUSVX, 315911701	DADVANTAGE CL	N 500 INDEX F	SPARTA
4 Federal 13 1	5 Wash Sale Loss	Gain/Loss (-)	3 Cost or Other Basis (b)	of Stocks, Bonds, etc. (a)	Sold	Acquisition	Sale or Exchange	
				22 Sples Dries	1e Quantity	1b Date of	1a Date of	Action
		build type)	The State of the S		USIP	8 Description, 1d Stock or Other Symbol, CUSIP	ption, 1d Stock	Descri
			このグシスとのころうつ	The second				_

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Pages 10 of 24



# 2013 TAX REPORTING STATEMEN' WENDY R DAVIS Recipient ID No. Resper's Fed ID Number

Copy Brok Recipient Owal No. 154 Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II 2013 Proceeds from Broker and Barter Exchange Transactions FORM 1099-B\*

arcared and/or schedule D, Part II				State	Vicinity Vicinity Vicinity			731 2 1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1																institutionisti salaministi salaministi salaministi salaministi salaministi salaministi salaministi salaministi	0.00	
יי ביא בי היביחיכת מ	bold type)		Gain/Loss (-)					,	215.60	22.40	111.32	39.90		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		72.44	75.15	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		3.28	1.55	0.94		kalladining kating alba kada da kada kada kada kada kada kada	8,906,9	-243.62
	(set poor in the safe shown below in bold type)		3 Cost or Other Basis (b)			1,161.94	1		1,018.28	96.09	430.36	168.13	1,712.86	1 2 2 3 1 5 6 1 1 2 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	9	911.92	135953	CC-7-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1	600	20.02	243.01	. 230.47	1,008.10	69.672.97		
Form 1000 B have miller			Za Sales Price of Stocks,	Durids, etc. (a)	,	1,204,90	84	1 233 88	118 40	7. C. 43	9.11.00	208.03	2,102.08	t	980 36	509 76	1,500.12		531.30	251.16	231.41	10.00	1,0 10.8/	78,336.34	ain	oss owed
(IRS		Ì	se Quantity Sold	A 0.0 A 0.04 FIFTON	ASS A, 891551888	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	NP FD, WAEMX, 936793884	434.465	41.000	183.620	12. 17.	\$0.1.1.		WASATCH INTERNATIONLOPPORTUNITIES FD, WAIOX, 936793702	375.136	177.617		A, SMAVX, 949917884	110.000	52.000	48.013		tini nini nini nini nini nini nini nini	,	Box E Long-Term Realized Gain	Box E Wash Sale Loss Disallowed
	or Other Symbol, CUSI	Th Date of	Acquisition	ED EQUITY EUNING			MARKETS SMALL CA	various	10/18/10	various	12/21/11		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	ONLOPPORTUNITIES	09/29/10	09/29/10		SHRT TRM MUNI CL	01/24/11	01/24/11	various.			j	BOX EL	BOXEN
	8 Description, 1d Stock or Other Symbol, CUSIP	Action 1a Date of		TOUCHSTONE FOCUSED FOLLITY BLIND CLASS AT MALE	Subtotals	; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	WASATCH EMERGING MARKETS SMALL CAP FD, WAEMX,	Sale 01/29/13	Sale 02/15/13	Sale 04/12/13	Sale 06/06/13	Stale		WASATCH INTERNATION	Sale 01/29/13	Sale 04/12/13	Subtotals	WELLS FARGO ULTRA SHRT TRM MUNI CL A, SMAVX, 949917884	Sale 01/29/13	Sale 04/12/13	Sale 10/10/13	Subtotals		CIALS		

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02/23/2014 9006035238

### SCHEDULE E (Form 1040)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.) ▶ Attach to Form 1040, 1040NR, or Form 1041.

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service Name(s) shown on return

Information about Schedule E and its separate instructions is at www.irs.gov/schedulee.

Attachment Sequence I

Your social security number Wendy R. Davis Income or Loss From Rental Real Estate and Royalties Note. If you are in the business of renting personal property, use Part I Schedule C or C-EZ (see instructions). If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40. Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions) В If "Yes," did you or will you file all required Forms 1099? No Yes 1a Physical address of each property (street, city, state, ZIP code) No Α .Cockrell Avenue, Fort Worth TX В C 1b Type of Property For each rental real estate property listed Fair Rental Personal Use QJV (from list below) above, report the number of fair rental and Days Days personal use days. Check the QJV box A 365 Α only if you meet the requirements to file as В a qualified joint venture. See instructions. В C Type of Property: Single Family Residence Vacation/Short-Term Rental Land Self-Rental Multi-Family Residence Commercial 6 Royalties Other (describe) Income: Properties: В 3 Rents received . . 3 20,840 4 Royalties received 4 400 Expenses: 5 Advertising ..... 5 110 Auto and travel (see instructions) ..... 6 Cleaning and maintenance ..... 7 2,678 Commissions ..... 8 8 Insurance ..... 9 Legal and other professional fees ..... 10 Management fees ..... 11 658 Mortgage interest paid to banks, etc. (see instructions) 12 Other interest ..... 13 <u> 370</u> Repairs ..... 14 14 1,607 Supplies ..... 15 Taxes ..... 16 741 17 Utilities ..... 17 260 Depreciation expense or depletion ..... 18 8. 107 60 Other (list) 19 19 20 Total expenses. Add lines 5 through 19 34,531 20 83 21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198 ..... -13,69121 317 22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions) 23a Total of all amounts reported on line 3 for all rental properties ..... 23a 20,840 b Total of all amounts reported on line 4 for all royalty properties ..... 23b 400 c Total of all amounts reported on line 12 for all properties ..... 23c d Total of all amounts reported on line 18 for all properties ..... 23d 8. 167 e Total of all amounts reported on line 20 for all properties ..... 34. 614 24 Income. Add positive amounts shown on line 21. Do not include any losses

25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here

26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2 ......

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