

Form **4868**

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

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

OMB No. 1545-0074

2013

**Mail To: Department of the Treasury
Internal Revenue Service
P.O. Box 1302
Charlotte, NC 28201-1302**

CUT HERE

Form **4868**

Department of the Treasury
Internal Revenue Service (99)

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

For calendar year 2013, or other tax year beginning _____, ending _____

OMB No. 1545-0074

2013

Part I Identification		Part II Individual Income Tax	
1 Your name(s) (see instructions) Wendy R. Davis		4 Estimate of total tax liability for 2013 \$	60,788
Address (see instructions) [REDACTED]		5 Total 2013 payments	788
City, town, or post office [REDACTED]	State TX	6 Balance due. Subtract line 5 from line 4 (see instructions)	60,000
ZIP Code 76107		7 Amount you are paying (see instr.) ▶	60,000
2 Your social security number [REDACTED]	3 Spouse's social security number	8 Check here if you are "out of the country" and a U.S. citizen or resident (see instructions) ▶	<input type="checkbox"/>
		9 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 ▶	<input type="checkbox"/>

For Privacy Act and Paperwork Reduction Act Notice, see page 4.

Form **4868** (2013)

Form 1040 Department of the Treasury—Internal Revenue Service (99) U.S. Individual Income Tax Return

2013

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2013, or other tax year beginning 2013, ending 2013. See separate instructions. Your first name and initial Wendy R. Last name Davis

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Foreign country name Foreign province/state/county Foreign postal code

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. You Spouse

Filing Status 1 [X] Single 2 [] Married filing jointly (even if only one had income) 3 [] Married filing separately. Enter spouse's SSN above and full name here. 4 [] Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. 5 [] Qualifying widow(er) with dependent child

Exemptions 6a [X] Yourself. If someone can claim you as a dependent, do not check box 6a. b [] Spouse. c Dependents: (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) [] if child under age 17 qual. for child tax credit (see instr.). Total number of exemptions claimed d Total number of exemptions claimed Add numbers on lines above 1

Income 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 4,428 8a Taxable interest. Attach Schedule B if required 8a 8 b Tax-exempt interest. Do not include on line 8a 8b 358 9a Ordinary dividends. Attach Schedule B if required 9a 3,958 b Qualified dividends 9b 3,674 10 Taxable refunds, credits, or offsets of state and local income taxes 10 11 Alimony received 11 12 Business income or (loss). Attach Schedule C or C-EZ 12 152,000 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here 13 9,284 14 Other gains or (losses). Attach Form 4797 14 15a IRA distributions 15a b Taxable amount 15b 16a Pensions and annuities 16a b Taxable amount 16b 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 17 89,728 18 Farm income or (loss). Attach Schedule F 18 19 Unemployment compensation 19 20a Social security benefits 20a b Taxable amount 20b 21 Other income. List type and amount 21 22 Combine the amounts in the far right column for lines 7 through 21. This is your total income 22 259,406

Adjusted Gross Income 23 Educator expenses 23 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ 24 25 Health savings account deduction. Attach Form 8889 25 26 Moving expenses. Attach Form 3903 26 27 Deductible part of self-employment tax. Attach Schedule SE 27 9,652 28 Self-employed SEP, SIMPLE, and qualified plans 28 29 Self-employed health insurance deduction 29 30 Penalty on early withdrawal of savings 30 31a Alimony paid b Recipient's SSN 31a 32 IRA deduction 32 33 Student loan interest deduction 33 34 Tuition and fees. Attach Form 8917 34 35 Domestic production activities deduction. Attach Form 8903 35 36 Add lines 23 through 35 36 9,652 37 Subtract line 36 from line 22. This is your adjusted gross income 37 249,754

Form 1040 (2013) Wendy R. Davis

Tax and Credits

38 Amount from line 37 (adjusted gross income) 249,754
39a Check if: [] You were born before January 2, 1949, [] Blind. Total boxes checked 39a
[] Spouse was born before January 2, 1949, [] Blind.
b If your spouse itemizes on a separate return or you were a dual-status alien, check here 39b
40 Itemized deductions (from Schedule A) or your standard deduction (see left margin)
41 Subtract line 40 from line 38 53,190
42 Exemptions. If line 38 is \$150,000 or less, multiply \$3,900 by the number on line 6d. Otherwise, see instructions 196,564
43 Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0- 3,900
44 Tax (see instr.). Check if any from: a [] Form(s) 8814 b [] Form 4972 c [] 192,664
45 Alternative minimum tax (see instructions). Attach Form 6251 45,591
46 Add lines 44 and 45 4,562
47 Foreign tax credit. Attach Form 1116 if required 50,153
48 Credit for child and dependent care expenses. Attach Form 2441 3
49 Education credits from Form 8863, line 19
50 Retirement savings contributions credit. Attach Form 8880
51 Child tax credit. Attach Schedule 8812, if required
52 Residential energy credits. Attach Form 5695
53 Other credits from Form: a [] 3800 b [] 8801 c []
54 Add lines 47 through 53. These are your total credits
55 Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-

Other Taxes

56 Self-employment tax. Attach Schedule SE
57 Unreported social security and Medicare tax from Form: a [] 4137 b [] 8919
58 Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required
59a Household employment taxes from Schedule H
b First-time homebuyer credit repayment. Attach Form 5405 if required
60 Taxes from: a [X] Form 8959 b [X] Form 8960 c [] Instructions; enter code(s) 798
61 Add lines 55 through 60. This is your total tax 70,252

Payments

If you have a qualifying child, attach Schedule EIC.

62 Federal income tax withheld from Forms W-2 and 1099 788
63 2013 estimated tax payments and amount applied from 2012 return
64a Earned income credit (EIC)
b Nontaxable combat pay election 64b
65 Additional child tax credit. Attach Schedule 8812
66 American opportunity credit from Form 8863, line 8
67 Reserved
68 Amount paid with request for extension to file 60,000
69 Excess social security and tier 1 RRTA tax withheld
70 Credit for federal tax on fuels. Attach Form 4136
71 Credits from Form: a [] 2439 b [X] Reserved c [] 8885 d []
72 Add lines 62, 63, 64a, and 65 through 71. These are your total payments 60,788

Refund

Direct deposit? See instructions.

73 If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid 60,788
74a Amount of line 73 you want refunded to you. If Form 8888 is attached, check here
b Routing number
c Type: [] Checking [] Savings
d Account number
75 Amount of line 73 you want applied to your 2014 estimated tax 75

Amount You Owe

76 Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions 10,710
77 Estimated tax penalty (see instructions) 1,246

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? [X] Yes. Complete below. [] No
Designee's name
Personal identification number (PIN)
Phone no.

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.
Your signature Date Your occupation Daytime phone number
Spouse's signature. If a joint return, both must sign. Date Spouse's occupation
If the IRS sent you an Identity Protection PIN, enter it here (see instr.)

Paid Preparer Use Only

Print/Type preparer's name Date 07/03/14 Check [] if self-employed [] PTIN
Firm's name Firm's EIN
Firm's address Phone no.

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

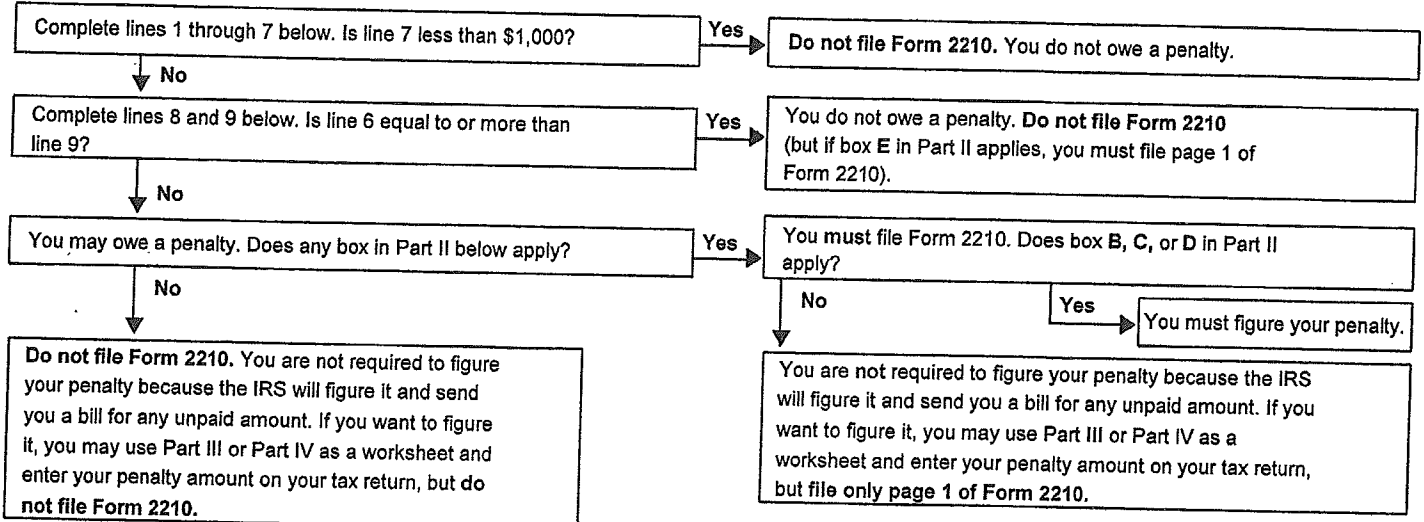
2013

Attachment
Sequence No. **06**

Identifying number

Wendy R. Davis

Do You Have To File Form 2210?



Part I Required Annual Payment

1 Enter your 2013 tax after credits from Form 1040, line 55 (see instructions if not filing Form 1040)	1	50,150
2 Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	20,102
3 Refundable credits (see instructions)	3	()
4 Current 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	4	70,252
5 Multiply line 4 by 90% (.90)	5	63,227
6 Withholding taxes. Do not include estimated tax payments (see instructions)	6	788
7 Subtract line 6 from line 4. If less than \$1,000, stop; you do not owe a penalty. Do not file Form 2210	7	69,464
8 Maximum required annual payment based on prior year's tax (see instructions)	8	86,969
9 Required annual payment. Enter the smaller of line 5 or line 8	9	63,227

- Next: Is line 9 more than line 6?
- No. You do not owe a penalty. Do not file Form 2210 unless box E below applies.
- Yes. You may owe a penalty, but do not file Form 2210 unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
 - If box A or E applies (but not B, C, or D) file only page 1 of Form 2210. You are not required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or IV as a worksheet and enter your penalty on your tax return, but file only page 1 of Form 2210.

Part II Reasons for Filing. Check applicable boxes. If none apply, do not file Form 2210.

- A You request a waiver (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you are not required to figure your penalty.
- B You request a waiver (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C Your income varied during the year and your penalty is reduced or eliminated when figured using the annualized income installment method. You must figure the penalty using Schedule AI and file Form 2210.
- D Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E You filed or are filing a joint return for either 2012 or 2013 and line 8 above is smaller than line 9 above. You must file page 1 of Form 2210, but you are not required to figure your penalty.

For Paperwork Reduction Act Notice, see separate instructions.

Form **2210** (2013)

Wendy R. Davis

Form 2210 (2013)

Part III Short Method

Can You Use the Short Method?

You may use the short method if:

- 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 Regular Method?

You must use the regular method (Part IV) instead of the short method if:

- 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	788											
12 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 owe a penalty. Do not file Form 2210 unless you checked box E in Part II	14		62,439										
15 Multiply line 14 by .01995	15		1,246										
16 • If the amount on line 14 was paid on or after 4/15/14, enter -0-. • If the amount on line 14 was paid before 4/15/14, make the following computation to find the amount to enter on line 16. <div style="margin-left: 40px;"> <table style="border: none;"> <tr> <td style="padding-right: 10px;">Amount on</td> <td></td> <td style="padding-right: 10px;">Number of days paid</td> <td></td> <td></td> </tr> <tr> <td style="padding-right: 10px;">line 14</td> <td style="padding: 0 5px;">x</td> <td style="padding-right: 10px;">before 4/15/14</td> <td style="padding: 0 5px;">x</td> <td style="padding-right: 10px;">.00008</td> </tr> </table> </div>	Amount on		Number of days paid			line 14	x	before 4/15/14	x	.00008	16		0
Amount on		Number of days paid											
line 14	x	before 4/15/14	x	.00008									
17 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 Form 2210 unless you checked a box in Part II	17		1,246										

**SCHEDULE A
(Form 1040)**

Itemized Deductions

OMB No. 1545-0074

2013

Attachment Sequence No. **07**

Department of the Treasury
Internal Revenue Service (99)

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

▶ Attach to Form 1040.

Name(s) shown on Form 1040

Wendy R. Davis

Your social security number [REDACTED]

Medical and Dental Expenses	Caution. Do not include expenses reimbursed or paid by others.		
	1	Medical and dental expenses (see instructions)	1
	2	Enter amount from Form 1040, line 38	2
	3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1949, multiply line 2 by 7.5% (.075) instead	3
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4
Taxes You Paid	5 State and local (check only one box):		
	a	<input type="checkbox"/> Income taxes, or	5
	b	<input checked="" type="checkbox"/> General sales taxes	2,367
	6	Real estate taxes (see instructions)	23,506
	7	Personal property taxes	
	8	Other taxes. List type and amount ▶	
	9	Add lines 5 through 8	9
			25,873
	Interest You Paid	10	Home mortgage interest and points reported to you on Form 1098
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 ▶	22,573
12		Points not reported to you on Form 1098. See instructions for special rules	12
13		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 Charity	16	Gifts by cash or check. If you made any gift of \$250 or more, see instructions	16
	17	Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	4,327
	18	Carryover from prior year	18
	19	Add lines 16 through 18	19
		4,327	
Casualty and Theft Losses	20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)	20
Job Expenses and Certain Miscellaneous Deductions	21	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ▶	21
	22	Tax preparation fees	22
	23	Other expenses—investment, safe deposit box, etc. List type and amount ▶ Advisor fees	742
	24	Add lines 21 through 23	5,412
	25	Enter amount from Form 1040, line 38	25
	26	Multiply line 25 by 2% (.02)	249,754
	26		4,995
27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27	
		417	
Other Miscellaneous Deductions	28	Other—from list in instructions. List type and amount ▶	28
Total Itemized Deductions	29	Is Form 1040, line 38, over \$150,000? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input checked="" type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	29
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here <input type="checkbox"/>	
			53,190

SCHEDULE C (Form 1040)

Profit or Loss From Business (Sole Proprietorship)

OMB No. 1545-0074

2013

Attachment Sequence No. 09

Department of the Treasury Internal Revenue Service (99)

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

Name of proprietor

Wendy R. Davis

Social security number (SSN)

A Principal business or profession, including product or service (see instructions) Attorney

B Enter code from instructions 541100

C Business name. If no separate business name, leave blank.

D Employer ID number (EIN), (see instr.)

E Business address (including suite or room no.) City, town or post office, state, and ZIP code

F Accounting method: (1) Cash (2) Accrual (3) Other (specify)

G Did you "materially participate" in the operation of this business during 2013? If "No," see instructions for limit on losses

H If you started or acquired this business during 2013, check here

I Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions)

J If "Yes," did you or will you file required Forms 1099?

Part I Income

Table with 7 rows for income calculation: 1 Gross receipts or sales (120,000), 2 Returns and allowances, 3 Subtract line 2 from line 1 (120,000), 4 Cost of goods sold, 5 Gross profit (120,000), 6 Other income, 7 Gross income (120,000)

Part II Expenses

Enter expenses for business use of your home only on line 30.

Table with 28 rows for expense calculation: 8 Advertising, 9 Car and truck expenses, 10 Commissions and fees, 11 Contract labor, 12 Depletion, 13 Depreciation and section 179 expense deduction, 14 Employee benefit programs, 15 Insurance, 16 Interest, 17 Legal and professional services, 18 Office expense, 19 Pension and profit-sharing plans, 20 Rent or lease, 21 Repairs and maintenance, 22 Supplies, 23 Taxes and licenses, 24 Travel, meals, and entertainment, 25 Utilities, 26 Wages, 27a Other expenses, 27b Reserved for future use, 28 Total expenses before expenses for business use of home (0), 29 Tentative profit or (loss) (120,000)

30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). Simplified method filers only: enter the total square footage of: (a) your home: and (b) the part of your home used for business: Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30

31 Net profit or (loss). Subtract line 30 from line 29. If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3. If a loss, you must go to line 32.

32 If you have a loss, check the box that describes your investment in this activity (see instructions). If you checked 32a, enter the loss on both Form 1040, line 12, (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on Form 1041, line 3. If you checked 32b, you must attach Form 6198. Your loss may be limited.

SCHEDULE C (Form 1040)

Profit or Loss From Business (Sole Proprietorship)

OMB No. 1545-0074

2013

Attachment Sequence No. 09

Department of the Treasury Internal Revenue Service (99)

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.

Name of proprietor

Wendy R. Davis

Social security number (SSN)

A Principal business or profession, including product or service (see instructions) Book

B Enter code from instructions 711510

C Business name. If no separate business name, leave blank. Croquet and Other Games LLC

D Employer ID number (EIN), (see instr.)

E Business address (including suite or room no.) City, town or post office, state, and ZIP code

F Accounting method: (1) [X] Cash (2) [] Accrual (3) [] Other (specify)

G Did you "materially participate" in the operation of this business during 2013? If "No," see instructions for limit on losses [X] Yes [] No

H If you started or acquired this business during 2013, check here [X] Yes [] No

I Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions) [] Yes [X] No

J If "Yes," did you or will you file required Forms 1099? [] Yes [X] No

Part I Income

Table with 7 rows for income calculation. Line 1: 132,000; Line 2: Returns and allowances; Line 3: 132,000; Line 4: Cost of goods sold; Line 5: 132,000; Line 6: Other income; Line 7: 132,000.

Part II Expenses Enter expenses for business use of your home only on line 30.

Table with 29 rows for expense calculation. Line 8-17: Advertising, Car and truck expenses, Commissions and fees, Contract labor, Depletion, Depreciation and section 179 expense deduction, Employee benefit programs, Insurance, Interest, Mortgage, Other. Line 18-27: Office expense, Pension and profit-sharing plans, Rent or lease, Vehicles, machinery, and equipment, Other business property, Repairs and maintenance, Supplies, Taxes and licenses, Travel, meals, and entertainment, Utilities, Wages. Line 28: 100,000; Line 29: 32,000.

30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). Simplified method filers only: enter the total square footage of: (a) your home: and (b) the part of your home used for business: Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30. 31 Net profit or (loss). Subtract line 30 from line 29. 31 32,000

32 If you have a loss, check the box that describes your investment in this activity (see instructions). 32a [] All investment is at risk. 32b [] Some investment is not at risk.



2013 TAX REPORTING STATEMENT

WENDY R DAVIS

Account No. [REDACTED]
Customer Service: 800-333-8000
Recipient ID No. [REDACTED]
Payer's Fed ID Number [REDACTED]

FORM 1099-B: 2013 Proceeds from Broker and Barter Exchange Transactions

Copy for Recipient: OMB No. 1545-0047

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
(This Label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld
ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, 003021250								
Sale	01/29/13	12/21/11	39.726	636.80	526.01	110.79		
Sale	04/12/13	12/21/11	17.173	270.64	227.39	43.25		
Sale	10/10/13	12/21/11	13.843	208.90	183.31	25.59		
Subtotals				1,116.34	936.71			
ASTONRIVER ROAD INDEPENDENT VALUE N, ARIVX, 00080Y611								
Sale	01/29/13	05/10/11	47.783	528.00	521.70	6.30		
Sale	04/12/13	05/10/11	26.187	291.20	285.91	5.29		
Subtotals				819.20	807.61			
COLUMBIA DIVIDEND OPPORTUNITY CL A, INUTX, 19763P283								
Sale	01/29/13	10/18/10	297.375	2,735.85	2,218.54	517.31		
Sale	02/15/13	10/18/10	32.000	296.64	238.73	57.91		
Sale	04/12/13	various	118.363	1,152.86	883.04	269.82		
Sale	10/10/13	08/26/11	11.749	117.96	87.65	30.31		
Subtotals				4,303.31	3,427.96			
COLUMBIA SELECT LRG CAP GROWTH CLASS A, ELGAX, 19765Y712								
Sale	01/29/13	08/26/11	244.329	3,574.53	2,949.67	624.86		
Sale	04/12/13	various	112.000	1,736.00	1,352.12	383.88		
Sale	10/10/13	12/21/11	6.814	120.61	82.26	38.35		
Subtotals				5,431.14	4,384.05			

* 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.



02/23/2014 9006035238
T8004FFC-4056108 001f02 0003/0012 00





2013 TAX REPORTING STATEMENT

WENDY R DAVIS

Account No. [REDACTED] Customer Service: 800-333-
 Recipient ID No. [REDACTED] Payer's Fed ID Number: [REDACTED]

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions

Copy 3 for Recipient (OMB No. 1545-0047)

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
 (This Label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld
T ROWE PRICE INTL STOCK ADVISOR CL, PAITX, 77956H823							
Sale	06/06/13	03/21/12	9.111	134.93	127.33	7.60	13 State
WELLS FARGO ULTRA SHRT TRM MUNI CL A, SMAVX, 949917884							
Sale	10/10/13	various	1.510	7.27	7.27	0.00	VI
TOTALS				2,885.28	2,840.99	0.00	
				Box D Long-Term Realized Gain			
				Box D Long-Term Realized Loss			
				Box D Wash Sale Loss Disallowed		0.77	

* 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

Account No.

Recipient ID No.

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

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
(This label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State
ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, 003021250	Sale	10/10/13	various	1.472	22.21	20.79	1.42		
DOUBLELINE TOTAL RT BOND FD CL N, DLTNX, 258620202	Sale	04/12/13	various	22.723	258.80	254.42	4.38		
	Sale	10/10/13	03/21/12	5.005	54.75	56.09	-1.34		
Subtotals				313.55	310.51		0.29		
DRIEHAUS ACTIVE INCOME FUND, LCMAX, 262028855	Sale	04/12/13	various	36.392	391.22	385.99	5.23		
FIDELITY INTER MEDIATE MUNI INCOME, FLTMX, 31638R204	Sale	04/12/13	various	81.066	864.97	854.39	10.58		
	Sale	10/10/13	03/21/12	8.008	81.84	84.37	-2.53		
Subtotals				946.81	938.76		0.48		
FORWARD EM CORPORATEDEBT FUND INVESTOR, FFXRX, 349913657	Sale	04/12/13	various	6.065	60.47	58.86	1.61		
JPMORGAN TAX AWARE REAL RTRN SELECT CL, TXRSX, 4812A2546	Sale	06/06/13	various	77.509	792.14	806.63	-14.49		
MFS INTERNATIONAL VALUE FUND CL A, MGIAX, 55273E301	Sale	04/12/13	03/21/12	4.830	144.23	124.60	19.63		
MORGAN STANLEY GLOBAL REAL ESTATE PORT P, MRLBX, 61744J135	Sale	04/12/13	03/21/12	6.733	72.45	60.25	12.20		

* 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.

02/23/2014 9006035238

T9004FFC4056108 001102 0002/0012 00



2013 TAX REPORTING STATEMENT

WENDY R DAVIS
 Account No. [REDACTED] Customer Service: 800-333-
 Recipient ID No. [REDACTED] Payer's Fed ID Number: [REDACTED]

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions
 Copy 1 for Recipient OMB No. 1545-0047

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)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Disallowed	4 Federal Income Tax Withheld	13 State	11
MORGAN STANLEY GLOBAREAL ESTATE PORT P, MRLBX, 61744J135										
Sale	02/15/13	03/21/12	10.382	102.98	92.90	10.08				
Sale	04/12/13	07/12/12	19.001	204.45	170.02	34.43				
Sale	06/06/13	various	25.648	255.97	229.50	26.47				
Subtotals				563.40	492.42					
TCW SMALL CAP GROWTH CLASS N, TGSNX, 87234N666										
Sale	01/08/13	07/12/12	13.048	339.64	317.33	22.31				
WASATCH FRONTIER EMERGING SMALL CO'S, WAFMX, 936793819										
Sale	01/29/13	10/12/12	213.413	578.35	525.04	53.31				
Sale	04/12/13	10/12/12	129.442	377.97	327.18	50.79				
Subtotals				956.32	852.22					
WELLS FARGO ULTRA SHRT TRM MUNI CL A, SMAVX, 949917884										
Sale	10/10/13	various	31.306	150.92	151.22	-0.30				
TOTALS				5,471.76	5,194.47					0.00
										0.00
										290.16
										-12.87
										0.00

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2013 TAX REPORTING STATEMENT

WENDY R DAVIS
 Account No. [REDACTED] Customer Service: 800-333-
 Recipient ID No. [REDACTED] Payer's Fed ID Number: [REDACTED]

FORM 1099-B 2013 Proceeds from Broker and Barter Exchange Transactions
 Copy to the Recipient (OMB No. 1545-0047)

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)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State
ABERDEEN EMERGING MKTS FUND CLASS A, GEGAX, 003021250									
Sale	10/10/13	various	0.774	11.67	10.94	0.73			
CLEARBRIDGE SMALL CAP GRW CL A, SASMX, 52470H815									
Sale	01/29/13	01/09/13	30.140	645.60	624.80	20.80			
Sale	04/12/13	01/09/13	17.090	385.39	359.23	26.16			
Subtotals				1,030.99	984.03				
FORWARD EM CORPORATEDEBT FUND INVESTOR, FFXRX, 349913657									
Sale	01/29/13	03/21/12	97.097	975.82	942.14	33.68			
Sale	04/12/13	various	38.980	388.63	378.31	10.32			
Subtotals				1,364.45	1,320.45				
JP MORGAN STRATEGIC INCOME OPPORT A, JSOAX, 4812A4385									
Sale	04/12/13	02/15/13	27.000	322.11	321.03	1.08			
JPMORGAN TAX AWARE REAL RTRN SELECT CL, TXRSX, 4812A2546									
Sale	06/06/13	various	7.190	73.47	74.84	-1.37			
MERGER FUND, MERFX, 589509108									
Sale	02/15/13	12/28/12	2.285	35.99	36.03	-0.04			
MERKARD CURRENCY FUND INVESTOR CL, MERKX, 34984T402									
Sale	04/12/13	10/12/12	21.712	261.41	263.77	-2.36			
Sale	06/06/13	various	30.471	361.39	370.19	-8.80			
Subtotals				622.80	633.96				

* 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.

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

Social security number or taxpayer identification number

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)
- (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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
					(f) Code(s) from instructions	(g) Amount of adjustment	
See attached schedule	Various	Various	2,885	2,841		1	45
2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶			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.

Form **8949**

Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ 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.

2013

Attachment
Sequence No. **12A**

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.

Part I

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see Column (e) in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)	
						(f) Code(s) from instructions	(g) Amount of adjustment		
	See attached schedule	Various	Various	5,472	5,194			278	
<p>2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your 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) ▶</p>									
				5,472	5,194			0	278

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.

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



Part III Summary

16 Combine lines 7 and 15 and enter the result	16	9,284
<ul style="list-style-type: none"> • If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22. • 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. 		
17 Are lines 15 and 16 both gains? <input checked="" type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> 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	19	
20 Are lines 18 and 19 both zero or blank? <input checked="" type="checkbox"/> 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. <input type="checkbox"/> 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: <ul style="list-style-type: none"> • 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? <input type="checkbox"/> 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). <input type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.		

**SCHEDULE D
(Form 1040)**

Capital Gains and Losses

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1040NR.
▶ 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.

2013
Attachment
Sequence No. 12

Name(s) shown on return

Wendy R. Davis

Your social security number

Part I Short-Term Capital Gains and Losses – Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-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 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	5,472	5,194	0	278
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions				
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on the back				278

Part II Long-Term Capital Gains and Losses – Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a 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				
8b 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 Box E checked	78,336	69,673	0	8,663
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions. See the instructions				13 298
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on the back				15 9,006

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

Schedule D (Form 1040) 2013

Form **W-2 Wage and Tax Statement** 2013

d Control number
 [REDACTED]

c Employer's name, address, and ZIP code
TEXAS SENATE
PAYROLL OFFICE
P. O. BOX 12068
AUSTIN TX 78711
00101

e Employee's name, address, and ZIP code
1500000000
WENDY R. DAVIS
 [REDACTED]

Void	7 Social security tips	1 Wages, tips, other comp. 4428.08	2 Federal income tax withheld 787.50
	8 Allocated tips	3 Social security wages 10159.54	4 Social security tax withheld 629.89
	9 [REDACTED]	5 Medicare wages and tips 10159.54	6 Medicare tax withheld 147.31
	10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12 D 5155.46
Suff.	13 <input type="checkbox"/> Salary employee <input checked="" type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-party sick pay	14 Other	12b C 570.10
	14 Employer identification number (EIN) [REDACTED]		12c DD 5742.84
			12d [REDACTED]
15 State	Employer's state I.D. no.	16 State wages, tips, etc.	17 State income tax
			18 Local wages, tips, etc.
			19 Local income tax
			20 Locality name

Copy B To Be Filed With Employee's FEDERAL Tax Return

This information is being furnished to the Internal Revenue Service.
 OMB No. 1545-0048

Dept. of the Treasury - IRS
 Visit the IRS Web Site at www.irs.gov/efile.

Wendy R. Davis

Form 8582 (2013)

Worksheet 6—Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
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 loss	(e) Allowed 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):					
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-					
Total			1.00		

Wendy R. Davis

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.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net Income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 1a, 1b, and 1c					

Worksheet 2—For Form 8582, Lines 2a and 2b (See instructions.)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b			

Worksheet 3—For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net Income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Rental property		13,691	25,543		39,234
Total. Enter on Form 8582, lines 3a, 3b, and 3c		13,691	25,543		

Worksheet 4—Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total			1.00		

Worksheet 5—Allocation of Unallowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Rental property	Sch E1	39,234	1.0000	39,234
Total		39,234	1.00	39,234

Form **8582**

AMT Version
Passive Activity Loss Limitations

OMB No. 1545-1008

2013

Attachment
 Sequence No. **88**

Department of the Treasury
 Internal Revenue Service (99)

▶ See separate instructions.
 ▶ Attach to Form 1040 or Form 1041.
 ▶ Information about Form 8582 and its instructions is available at www.irs.gov/form8582.

Name(s) shown on return

Identifying number

Wendy R. Davis

Part I 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, column (a))		
1b	Activities with net loss (enter the amount from Worksheet 1, column (b))		
1c	Prior years unallowed losses (enter the amount from Worksheet 1, column (c))		
1d	Combine lines 1a, 1b, and 1c		

Commercial Revitalization Deductions From Rental Real Estate Activities

2a	Commercial revitalization deductions from Worksheet 2, column (a)		
2b	Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)		
2c	Add lines 2a and 2b		

All Other Passive Activities

3a	Activities with net income (enter the amount from Worksheet 3, column (a))		
3b	Activities with net loss (enter the amount from Worksheet 3, column (b))	13,691	
3c	Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	25,543	
3d	Combine lines 3a, 3b, and 3c		-39,234

4	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
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- 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 Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

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	
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		
10	Enter the smaller of line 5 or line 9		0

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.

11	Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions		
12	Enter the loss from line 4		
13	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		

Part IV Total Losses Allowed

15	Add the income, if any, on lines 1a and 3a and enter the total		
16	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		0

Wendy R. Davis

Form 8582 (2013)



Worksheet 6—Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
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 loss	(e) Allowed 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):					
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-					
Total			1.00		

Wendy R. Davis

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.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 1a, 1b, and 1c					

Worksheet 2—For Form 8582, Lines 2a and 2b (See instructions.)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b			

Worksheet 3—For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Rental property		13,691	25,543		39,234
Total. Enter on Form 8582, lines 3a, 3b, and 3c		13,691	25,543		

Worksheet 4—Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total			1.00		

Worksheet 5—Allocation of Unallowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Rental property	Sch E1	39,234	1.0000	39,234
Total		39,234	1.00	39,234

Form **8582**

Department of the Treasury
Internal Revenue Service (99)

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

2013

Attachment
Sequence No. **88**

Name(s) shown on return

Identifying number

Wendy R. Davis

Part I 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, column (a))		
1b	Activities with net loss (enter the amount from Worksheet 1, column (b))		
1c	Prior years unallowed losses (enter the amount from Worksheet 1, column (c))		
1d	Combine lines 1a, 1b, and 1c		
Commercial Revitalization Deductions From Rental Real Estate Activities			
2a	Commercial revitalization deductions from Worksheet 2, column (a)		
2b	Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)		
2c	Add lines 2a and 2b		
All Other Passive Activities			
3a	Activities with net income (enter the amount from Worksheet 3, column (a))		
3b	Activities with net loss (enter the amount from Worksheet 3, column (b))	13,691	
3c	Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	25,543	
3d	Combine lines 3a, 3b, and 3c		-39,234
4	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. If line 4 is a loss and: <ul style="list-style-type: none"> • 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. 		-39,234

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 Special Allowance for Rental Real Estate Activities With Active Participation

Note: Enter all numbers in Part II as positive amounts. See instructions for an example.

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). 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.	0	
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		
10	Enter the smaller of line 5 or line 9. If line 2c is a loss, go to Part III. Otherwise, go to line 15.		0

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions.

11	Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	
12	Enter the loss from line 4	
13	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	

Part IV Total Losses Allowed

15	Add the income, if any, on lines 1a and 3a and enter the total	
16	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	0

Form **8960**

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

OMB No. 1545-2227

2013

Attachment
Sequence No. **72**

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041.

▶ Information about Form 8960 and its separate instructions is at www.irs.gov/form8960.

Name(s) shown on Form 1040 or Form 1041

Wendy R. Davis

Your social security number or EIN

Part I Investment Income

Section 6013(g) election (see instructions)

Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (Form 1040, line 8a; or Form 1041, line 1)		1	8
2	Ordinary dividends (Form 1040, line 9a; or Form 1041, line 2a)		2	3,958
3	Annuities from nonqualified plans (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (Form 1040, line 17; or Form 1041, line 5)	89,728		
4b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see Instructions)	-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	9,284		
5b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)			
5c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)			
d	Combine lines 5a through 5c		5d	9,284
6	Changes to investment income for certain CFCs and PFICs (see instructions)		6	
7	Other modifications to investment income (see instructions)		7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7		8	13,567

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see Instructions)			
9b	State income tax (see instructions)			
9c	Miscellaneous investment expenses (see instructions)	417		
d	Add lines 9a, 9b, and 9c		9d	417
10	Additional modifications (see instructions)		10	
11	Total deductions and modifications. Add lines 9d and 10		11	417

Part III 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-		12	13,150
13	Modified adjusted gross income (see instructions)	249,754		
14	Threshold based on filing status (see instructions)	200,000		
15	Subtract line 14 from line 13. If zero or less, enter -0-	49,754		
16	Enter the smaller of line 12 or line 15		16	13,150
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and on Form 1040, line 60		17	500
18a	Net investment income (line 12 above)			
18b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)			
18c	Undistributed net investment income. Subtract line 18b from 18a (see instructions)			
19a	Adjusted gross income (see instructions)			
19b	Highest tax bracket for estates and trusts for the year (see instructions)			
19c	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		21	

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

Form **8960** (2013)

Form **8959**

Additional Medicare Tax

OMB No. 1545-0074

2013

Attachment Sequence No. **71**

Department of the Treasury
Internal Revenue Service

▶ If any line does not apply to you, leave it blank. See separate instructions.

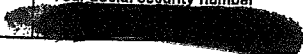
▶ Attach to Form 1040, 1040NR, 1040-PR, or 1040-SS.

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

Name(s) shown on Form 1040

Wendy R. Davis

Your social security number



Part I Additional Medicare Tax on Medicare Wages

1 Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	10,160		
2 Unreported tips from Form 4137, line 6	2			
3 Wages from Form 8919, line 6	3			
4 Add lines 1 through 3	4	10,160		
5 Enter the following amount for your filing status:	5			
Married filing jointly		\$250,000		
Married filing separately		\$125,000		
Single, Head of household, or Qualifying widow(er)		\$200,000		
6 Subtract line 5 from line 4. If the result is zero or less, enter -0-	6			0
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (.009). Enter here and go to Part II	7			

Part II Additional Medicare Tax on Self-Employment Income

8 Self-employment income from Schedule SE (Form 1040), 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.)	8	222,943		
9 Enter the following amount for your filing status:				
Married filing jointly		\$250,000		
Married filing separately		\$125,000		
Single, Head of household, or Qualifying widow(er)		\$200,000		
10 Enter the amount from line 4	9	200,000		
11 Subtract line 10 from line 9. If zero or less, enter -0-	10	10,160		
12 Subtract line 11 from line 8. If the result is zero or less, enter -0-	11	189,840		
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (.009). Enter here and go to Part III	12			33,103
	13			298

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RTTA) Compensation

14 Railroad retirement (RTTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14			
15 Enter the following amount for your filing status:				
Married filing jointly		\$250,000		
Married filing separately		\$125,000		
Single, Head of household, or Qualifying widow(er)		\$200,000		
16 Subtract line 15 from line 14. If zero or less, enter -0-	15	200,000		
17 Additional Medicare Tax on railroad retirement (RTTA) compensation. Multiply line 16 by 0.9% (.009). Enter here and go to Part IV	16			0
	17			

Part IV Total Additional Medicare Tax

18 Add lines 7, 13, and 17. Also include this amount on Form 1040, line 60, (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions) and go to Part V	18			298
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Part V Withholding Reconciliation

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		
21 Multiply line 20 by 1.45% (.0145). This is your regular Medicare tax withholding on Medicare wages	21	147		
22 Subtract line 21 from line 19. This is your Additional Medicare Tax withholding on Medicare wages	22			0
23 Additional Medicare Tax withholding on railroad retirement (RTTA) compensation from Form W-2, box 14 (see instructions)	23			
24 Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, line 62 (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions)	24			

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

Wendy R. Davis

Form 6251 (2013)

Part II Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

36	Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31		36	197,825
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	37	12,680	
38	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	38		
39	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	39	12,680	
40	Enter the smaller of line 36 or line 39	40	12,680	
41	Subtract line 40 from line 36	41	185,145	
42	If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	42	48,251	
43	Enter: <ul style="list-style-type: none"> • \$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. 	43	36,250	
44	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 (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-	44	179,984	
45	Subtract line 44 from line 43. If zero or less, enter -0-	45	0	
46	Enter the smaller of line 36 or line 37	46	12,680	
47	Enter the smaller of line 45 or line 46. This amount is taxed at 0%	47		
48	Subtract line 47 from line 46	48	12,680	
49	Enter the amount from the Line 49 Worksheet in the instructions	49	220,016	
50	Enter the smaller of line 48 or line 49	50	12,680	
51	Multiply line 50 by 15% (.15)	51	1,902	
52	Add lines 47 and 50	52	12,680	
53	Subtract line 52 from line 46	53	0	
54	Multiply line 53 by 20% (.20)	54		
55	Add lines 41, 52, and 53	55		
56	Subtract line 55 from line 36	56		
57	Multiply line 56 by 25% (.25)	57		
58	Add lines 42, 51, 54, and 57	58	50,153	
59	If line 36 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	59	51,801	
60	Enter the smaller of line 58 or line 59 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31	60	50,153	

Alternative Minimum Tax—Individuals

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

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1040NR.

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

Wendy R. Davis

Part I Alternative Minimum Taxable Income (See instructions for how to complete each line.)

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.)	1	196,564
2	Medical and dental. If you or your spouse was 65 or older, enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3	Taxes from Schedule A (Form 1040), line 9	3	25,873
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	0
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	5	417
6	If Form 1040, line 38, is \$150,000 or less, enter -0-. Otherwise, see instructions	6	
7	Tax refund from Form 1040, line 10 or line 21	7	
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Alternative tax net operating loss deduction	11	
12	Interest from specified private activity bonds exempt from the regular tax	12	6
13	Qualified small business stock (7% of gain excluded under section 1202)	13	
14	Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17	Disposition of property (difference between AMT and regular tax gain or loss)	17	
18	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19	Passive activities (difference between AMT and regular tax income or loss)	19	0
20	Loss limitations (difference between AMT and regular tax income or loss)	20	0
21	Circulation costs (difference between regular tax and AMT)	21	
22	Long-term contracts (difference between AMT and regular tax income)	22	
23	Mining costs (difference between regular tax and AMT)	23	
24	Research and experimental costs (difference between regular tax and AMT)	24	
25	Income from certain installment sales before January 1, 1987	25	
26	Intangible drilling costs preference	26	
27	Other adjustments, including income-based related adjustments	27	
28	Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$238,550, see instructions.)	28	222,860

Part II Alternative Minimum Tax (AMT)

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 head of household \$115,400 \$51,900 Married filing jointly or qualifying widow(er) 153,900 80,800 Married filing separately 76,950 40,400 If line 28 is over the amount shown above for your filing status, see instructions.	29	25,035
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 35, and go to line 34	30	197,825
31	• If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 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 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result.	31	50,153
32	Alternative minimum tax foreign tax credit (see instructions)	32	3
33	Tentative minimum tax. Subtract line 32 from line 31	33	50,150
34	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 without using Schedule J (see instructions)	34	45,588
35	AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35	4,562

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

Name of person with self-employment income (as shown on Form 1040) Wendy R. Davis Social security number of person with self-employment income XXXXXXXXXX

Section B — Long Schedule SE

Part I Self-Employment Tax

Note. If your only income subject to self-employment tax is church employee income, see instructions. Also see instructions for the definition of church employee income.

<p>A If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I <input type="checkbox"/></p>			
1a	Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. Note. Skip lines 1a and 1b if you use the farm optional method (see instructions)	1a	
b	If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Z	1b	
2	Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report. Note. Skip this line if you use the nonfarm optional method (see instructions)	2	241,411
3	Combine lines 1a, 1b, and 2	3	241,411
4a	If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3. Note. If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.	4a	222,943
b	If you elect one or both of the optional methods, enter the total of lines 15 and 17 here	4b	
c	Combine lines 4a and 4b. If less than \$400, stop; you do not owe self-employment tax. Exception. If less than \$400 and you had church employee income, enter -0- and continue	4c	222,943
5a	Enter your church employee income from Form W-2. See instructions for definition of church employee income	5a	
b	Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-	5b	0
6	Add lines 4c and 5b	6	222,943
7	Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2013	7	113,700
8a	Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$113,700 or more, skip lines 8b through 10, and go to line 11	8a	10,160
b	Unreported tips subject to social security tax (from Form 4137, line 10)	8b	
c	Wages subject to social security tax (from Form 8919, line 10)	8c	
d	Add lines 8a, 8b, and 8c	8d	10,160
9	Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11	9	103,540
10	Multiply the smaller of line 6 or line 9 by 12.4% (.124)	10	12,839
11	Multiply line 6 by 2.9% (.029)	11	6,465
12	Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 56, or Form 1040NR, line 54	12	19,304
13	Deduction for one-half of self-employment tax. Multiply line 12 by 50% (.50). Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27	13	9,652

Part II Optional Methods To Figure Net Earnings (see instructions)

<p>Farm Optional Method. You may use this method only if (a) your gross farm income¹ was not more than \$6,960, or (b) your net farm profits² were less than \$5,024.</p>			
14	Maximum income for optional methods	14	4,640
15	Enter the smaller of: two-thirds (2/3) of gross farm income ¹ (not less than zero) or \$4,640. Also include this amount on line 4b above	15	
<p>Nonfarm Optional Method. You may use this method only if (a) your net nonfarm profits³ 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.</p>			
16	Subtract line 15 from line 14	16	
17	Enter the smaller of: two-thirds (2/3) of gross nonfarm income ⁴ (not less than zero) or the amount on line 16. Also include this amount on line 4b above	17	

¹ From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.

² 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.

³ 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.

⁴ 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.

Schedule E (Form 1040) 2013

Name(s) shown on return. Do not enter name and social security number if shown on other side.

Your social security number

Wendy R. Davis

Caution. The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II Income or Loss From Partnerships and S Corporations Note. If you report a loss from an at-risk activity for which any amount is not at risk, you must check the box in column (e) on line 28 and attach Form 6198. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk, excess farm loss, or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section. Yes No

Table with 5 columns: (a) Name, (b) Enter P for partnership, S for S corporation, (c) Check if foreign partnership, (d) Employer identification number, (e) Check if any amount is not at risk. Row A: Newby Davis PLLC, P, [redacted], [redacted].

Table with 5 columns: (f) Passive loss allowed, (g) Passive income from Schedule K-1, (h) Nonpassive loss from Schedule K-1, (i) Section 179 expense deduction from Form 4562, (j) Nonpassive income from Schedule K-1. Totals: 89,411.

Part III Income or Loss From Estates and Trusts

Table with 2 columns: (a) Name, (b) Employer identification number. Rows A and B are empty.

Table with 4 columns: (c) Passive deduction or loss allowed, (d) Passive income from Schedule K-1, (e) Deduction or loss from Schedule K-1, (f) Other income from Schedule K-1. Totals: 37.

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs)—Residual Holder

Table with 5 columns: (a) Name, (b) Employer identification number, (c) Excess inclusion from Schedules Q, line 2c, (d) Taxable income (net loss) from Schedules Q, line 1b, (e) Income from Schedules Q, line 3b. Row 39: Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below. 39

Part V Summary

Summary table with 2 columns: Description, Amount. Row 40: Net farm rental income or (loss) from Form 4835. Also, complete line 42 below. 40. Row 41: 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 89,728. Row 42: Reconciliation of farming and fishing income. Enter your gross 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 V; and Schedule K-1 (Form 1041), box 14, code F (see instructions). 42. Row 43: 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. 43.



2013 TAX REPORTING STATEMENT

WENDY R DAVIS

Account No. [REDACTED] Customer Service: 800-333-
 Recipient ID No. [REDACTED] Payer's Fed ID Number: [REDACTED]

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Copy for Recipient: OMB NO. 1545-0047

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 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	14
DELAWARE VALUE FD CL A, DDVAX, 24610C981										
Sale	01/29/13	09/29/10	171.218	2,258.36	1,634.55	623.81				
Sale	04/12/13	09/29/10	77.327	1,093.40	738.21	355.19				
Subtotals				3,351.76	2,372.76					
DOUBLELINE TOTAL RT BOND FD CL N, DLTNX, 258620202										
Sale	01/29/13	various	235.207	2,674.30	2,612.38	61.92				
Sale	04/12/13	various	84.089	957.79	933.96	23.83				
Subtotals				3,632.09	3,546.34					
DRIEHAUS ACTIVE INCOME FUND, LCMAX, 262028855										
Sale	01/29/13	08/26/11	102.000	1,098.54	1,069.90	28.64				
Sale	04/12/13	various	17.608	189.28	184.70	4.58				
Subtotals				1,287.82	1,254.60					
FIDELITY INTERMEDIATE MUNI INCOME, FLTMX, 31638R204										
Sale	01/29/13	09/29/10	607.569	6,476.69	6,326.40	150.29				
Sale	02/15/13	09/29/10	6.000	63.90	62.48	1.42				
Sale	04/12/13	various	199.671	2,130.49	2,079.10	51.39				
Subtotals				8,671.08	8,467.98					
JPMORGAN TAX AWARE REAL RTRN SELECT CL, TRRSX, 4812A2546										
Sale	01/29/13	various	227.216	2,390.31	2,276.31	114.00				
Sale	04/12/13	05/10/11	107.102	1,121.36	1,072.97	48.39				
Sale	06/06/13	various	19.038	194.58	190.72	3.86				
Subtotals				3,706.25	3,540.00					

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2013 TAX REPORTING STATEMENT

WENDY R DAVIS
 Account No. [REDACTED]
 Customer Service: 800-333-
 Recipient ID No. [REDACTED]
 Investor's Fed ID Number: [REDACTED]

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient, OMB No. 1545-0047

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
 (This label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	11
LISTED PRIVATE EQUITY CLASS A, LPEFX, 317609816										
Sale	01/29/13	09/29/10	114.177	638.25	576.67	61.58				WV
Sale	04/12/13	various	50.167	300.00	253.38	46.62				
Subtotals				938.25	830.05					
MERGER FUND, MERFX, 589509108										
Sale	01/29/13	various	59.924	944.40	949.52	-5.12				
Sale	02/15/13	various	51.839	816.46	821.45	-4.99				
Subtotals				1,760.86	1,770.97					
MERK HARD CURRENCY FUND INVESTOR CL, MERKX, 34984T402										
Sale	01/29/13	08/26/11	66.728	821.42	871.49	-50.07				
Sale	04/12/13	various	8.487	102.19	110.85	-8.66				
Subtotals				923.61	982.34					
MFS INTERNATIONAL VALUE FUND CL A, MGIAX, 55273E301										
Sale	01/29/13	09/29/10	75.491	2,140.92	1,759.28	381.64				
Sale	04/12/13	various	32.294	964.29	752.59	211.70				
Subtotals				3,105.21	2,511.87					
MORGAN STANLEY GLOBAL REAL ESTATE PORT P, MRIBX, 61744J135										
Sale	01/29/13	05/10/11	90.909	910.00	843.84	66.16				
Sale	02/15/13	various	15.697	155.72	145.70	10.02				
Subtotals				1,065.72	989.54					

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02/23/2014 9006035238

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2013 TAX REPORTING STATEMENT

WENDY R DAVIS
 Account No. [REDACTED]
 Customer Service: 800-333-4
 Recipient ID No. [REDACTED]
 Buyer's Fed ID Number: [REDACTED]

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient,OMB No 1545

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
 (This label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	1i
NORTHERN INTERMED TAX EXEMPT FUND, NOITX, 665162871										
Sale	01/29/13	various	610.567	6,569.70	6,460.87	108.83				
Sale	02/15/13	10/18/10	12.000	129.00	126.98	2.02				
Sale	04/12/13	various	266.752	2,875.59	2,822.71	52.88				
Sale	10/10/13	various	13.025	134.29	137.82	-3.53				
Subtotals				9,708.58	9,548.38	0.27				
RIDGEWORTH MID CAP VALUE EQUITY CL I, SMVTX, 76628R615										
Sale	01/29/13	09/29/10	131.475	1,651.32	1,434.84	216.48				
Sale	04/12/13	various	56.256	739.20	613.94	125.26				
Subtotals				2,390.52	2,048.78	0.27				
RIVERNORTH CORE OPPORTUNITY FUND, RNCOX, 766881N103										
Sale	01/29/13	09/29/10	173.426	2,103.66	1,953.02	150.64				
Sale	04/12/13	various	79.191	981.18	891.80	89.38				
Subtotals				3,084.84	2,844.82	0.27				
RS GLOBAL NATURAL RESOURCES CL A, RSNRX, 74972H705										
Sale	01/29/13	various	38.618	1,457.82	1,458.49	-0.67				
Sale	04/12/13	05/10/11	19.331	732.83	730.08	2.75				
Sale	06/06/13	various	4.980	189.35	188.08	1.27				
Subtotals				2,380.00	2,376.65	0.27				
SPARTAN 500 INDEX FDADVANTAGE CLASS, FUSVX, 315911701										
Sale	01/29/13	various	40.793	2,179.56	1,676.42	503.14				
Sale	04/12/13	08/28/11	19.054	1,072.93	783.05	289.88				

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2013 TAX REPORTING STATEMENT

WENDY R DAVIS

Account No. [REDACTED]
 Customer Service: 800-333-4
 Recipient ID No. [REDACTED]
 Buyer's Fed ID Number: [REDACTED]

FORM 1099-B

2013 Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0047

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
 (This Label is a Substitute for Boxes 1c & 6)

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

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc. (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State	1i
SPARTAN 500 INDEX FUND ADVANTAGE CLASS, FUSVX, 315911701										
Sale	10/10/13	08/26/11	0.979	58.73	40.23	18.50				W
Subtotals				3,311.22	2,499.70					
T ROWE PRICE GROWTH STOCK ADVISOR CL, TRSAX, 741479208										
Sale	01/29/13	09/29/10	80.041	3,119.20	2,281.26	837.94				
Sale	04/12/13	09/29/10	39.029	1,589.25	1,112.37	476.88				
Subtotals				4,708.45	3,393.63					
T ROWE PRICE INTL STOCK ADVISOR CL, PAITX, 77956H823										
Sale	01/29/13	05/10/11	108.412	1,606.66	1,594.77	11.89				
Sale	02/15/13	05/10/11	4.003	59.12	58.89	0.23				
Sale	04/12/13	various	48.194	713.76	708.95	4.81				
Sale	06/06/13	12/21/11	3.828	56.69	56.30	0.39				
Subtotals				2,436.23	2,418.91					
TCW DIVIDEND FOCUSED FUND CL N, TGIQX, 87234N518										
Sale	01/29/13	09/29/10	174.331	2,278.50	1,635.98	642.52				
Sale	04/12/13	09/29/10	93.333	1,302.93	875.87	427.06				
Subtotals				3,581.43	2,511.85					
TCW SMALL CAP GROWTH CLASS N, TGSNX, 87234N666										
Sale	01/08/13	05/10/11	30.790	801.46	972.04	-170.58				
TOUCHSTONE FOCUSED EQUITY FUND CLASS A, 89155T888										
Sale	01/29/13	01/24/11	59.716	757.80	739.16	18.64				
Sale	04/12/13	01/24/11	34.156	447.10	422.78	24.32				

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02/23/2014 9006035238

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**SCHEDULE E
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041.

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

OMB No. 1545-0074

2013

Attachment Sequence No. **13**

Name(s) shown on return

Your social security number

Wendy R. Davis

Part I Income or Loss From Rental Real Estate and Royalties Note. If you are in the business of renting personal property, use 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.

A Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions) Yes No
B If "Yes," did you or will you file all required Forms 1099? Yes No

1a Physical address of each property (street, city, state, ZIP code)
A .Cockrell Avenue, Fort Worth TX
B
C

1b	Type of Property (from list below)	2	For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days		Personal Use Days		QJV	
				A	B	A	B	A	B
A	1			365					
B	6								
C									

- Type of Property:**
 1 Single Family Residence 3 Vacation/Short-Term Rental 5 Land 7 Self-Rental
 2 Multi-Family Residence 4 Commercial 6 Royalties 8 Other (describe)

Income:	Properties:	A	B	C
3 Rents received	3	20,840		
4 Royalties received	4		400	
Expenses:				
5 Advertising	5	110		
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7	2,678		
8 Commissions	8			
9 Insurance	9			
10 Legal and other professional fees	10			
11 Management fees	11	1,658		
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest	13	7,370		
14 Repairs	14	1,607		
15 Supplies	15			
16 Taxes	16	12,741	23	
17 Utilities	17	260		
18 Depreciation expense or depletion	18	8,107	60	
19 Other (list) ▶	19			
20 Total expenses. Add lines 5 through 19	20	34,531	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	21	-13,691	317	
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	0		
23a Total of all amounts reported on line 3 for all rental properties	23a	20,840		
23b Total of all amounts reported on line 4 for all royalty properties	23b	400		
23c Total of all amounts reported on line 12 for all properties	23c			
23d Total of all amounts reported on line 18 for all properties	23d	8,167		
23e Total of all amounts reported on line 20 for all properties	23e	34,614		
24 Income. Add positive amounts shown on line 21. Do not include any losses	24		317	
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25			
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	26			317

For Paperwork Reduction Act Notice, see the separate instructions.
DAA