COVER PAGE

Filing Checklist For 2006 Tax Return Filed On Standard Forms

Prepared on: 05/03/2007 11:53:04 pm

Return: C:\Documents and Settings\Jeremy Peterson\My Documents\TaxCut\Jeremy Peterson's Taxes.T06

To file your 2006 tax return, simply follow these instructions:

Step 1 - Sign and date the return

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2 - Assemble the return

These forms should be assembled behind Form 1040 --U.S. Individual Income Tax Return

- Schedule A
- Form 2106

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (Sonic Automotive of Chattanooga)

2nd (Best Buy Stores LP)

Step 3 - Mail the return

Mail the return to this address:

Internal Revenue Service Center
Austin, TX 73301-0002

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.
- DHL Same Day Service, Next Day 10:30 am, Next Day 12:00 pm, Next Day 3:00 pm, or 2nd Day Service.
- FedEx Priority Overnight, Standard Overnight, 2Day, International Priority, or International First.
- United Parcel Service Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 4 - Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- - Background Worksheet
- - Form 1099-INT/OID
- - Non-W2 Wages

2006 Tax Return Information. Keep this for your records.

Here is some additional information about your 2006 return. Keep this information with your records. You will need your 2006 AGI to electronically sign your return next year.

Quick Summary

Total (Gross) Income	$40,775
Adjusted Gross Income	40,775
Taxable Income	31,043
Total Federal Tax	4,314
Total Payments	5,375
Penalties	0
Refund Amount	1,061
Amount You Owe	$0

Form 1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 2006
(99) IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2006, or other tax year beginning , 2006, ending , 20 — OMB No. 1545-0074

Label
(See instructions.)
Use the IRS label. Otherwise, please print or type.
LABEL HERE

Your first name and initial	Jeremy Q
Last name	Peterson
Your social security number	414-45-3120
If a joint return, spouse's first name and initial	
Last name	
Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions.	2313 Covey Lane
Apt. no.	
City, town or post office, state, and ZIP code. If you have a foreign address, see instructions.	Chattanooga TN 37421

▲ You **must** enter your SSN(s) above. ▲

Checking a box below will not change your tax or refund

Presidential Election Campaign ▶ Check here if you, or your spouse if filing jointly, want $3 to go to this fund (see instructions) ► ☐ **You** ☐ **Spouse**

Filing Status
Check only one box.

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 instr.) If the qualifying person is a child but not your dependent, enter this child's name here. ►
5 ☐ Qualifying widow(er) with dependent child (see instructions)

Exemptions
6a [X] **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☐ **Spouse**

Boxes checked on 6a and 6b: 1

c **Dependents:**

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) X if qualifying child for child tax credit (see instr.)

If more than four dependents, see instructions.

No. of children on 6c who:
• lived with you
• did not live with you due to divorce or separation (see instructions)
Dependents on 6c not entered above

d Total number of exemptions claimed — Add numbers on lines above ▶ 1

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

If you did not get a W-2, see instructions.

Enclose, but do not attach, any payment. Also, please use **Form 1040-V**.

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	40,690
8a	**Taxable** interest. Attach Schedule B if required	8a	85
b	**Tax-exempt** interest. **Do not** include on line 8a	8b	0
9a	Ordinary dividends. Attach Schedule B if required	9a	0
b	Qualified dividends (see instructions)	9b	0
10	Taxable refunds, credits, or offsets of state and local income taxes (see instructions)	10	0
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	0
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐	13	0
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions 15a — b Taxable amount (see instructions)	15b	0
16a	Pensions and annuities 16a — b Taxable amount (see instructions)	16b	0
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	
18	Farm income or (loss). Attach Schedule F	18	0
19	Unemployment compensation	19	
20a	Social security benefits 20a — b Taxable amount (see instructions)	20b	
21	Other income. List type and amount (see instructions)	21	0
22	Add the amounts in the far right column for lines 7 through 21. This is your **total income** ▶	22	40,775

Adjusted Gross Income

23	Archer MSA deduction. Attach Form 8853.	23	0
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	0
25	Health savings account deduction. Attach Form 8889	25	0
26	Moving expenses. Attach Form 3903	26	0
27	One-half of self-employment tax. Attach Schedule SE	27	0
28	Self-employed SEP, SIMPLE, and qualified plans	28	0
29	Self-employed health insurance deduction (see instructions)	29	0
30	Penalty on early withdrawal of savings	30	0
31a	Alimony paid b Recipient's SSN ▶	31a	
32	IRA deduction (see instructions)	32	0
33	Student loan interest deduction (see instructions)	33	
34	Jury duty pay you gave to your employer	34	
35	Domestic production activities deduction. Attach Form 8903	35	0
36	Add lines 23 through 31a and 32 through 35	36	0
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶	37	40,775

Tax and Credits

Standard Deduction for—
• People who checked any box on line 39a or 39b **or** who can be claimed as a dependent, see instr.
• All others:
Single or Married filing separately, $5,150
Married filing jointly or Qualifying widow(er), $10,300
Head of household, $7,550

38	Amount from line 37 (adjusted gross income)			38	40,775
39a	Check if: ☐ **You** were born before January 2, 1942, ☐ Blind. ☐ **Spouse** was born before January 2, 1942, ☐ Blind. **Total boxes checked** ▶ 39a		0		
b	If your spouse itemizes on a separate return, or you were a dual-status alien, see instructions and check here ▶ 39b ☐				
40	**Itemized deductions** (from Schedule A) **or** your **standard deduction** (see left margin)			40	6,432
41	Subtract line 40 from line 38			41	34,343
42	If line 38 is over $112,875, or you provided housing to a person displaced by Hurricane Katrina, see instructions. Otherwise, multiply $3,300 by the total number of exemptions claimed on line 6d			42	3,300
43	**Taxable income**. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-			43	31,043
44	**Tax** (see instructions). Check if any tax is from a ☐ Form(s) 8814 b ☐ Form 4972			44	4,314
45	**Alternative minimum tax** (see instructions). Attach Form 6251			45	0
46	Add lines 44 and 45 ▶			46	4,314
47	Foreign tax credit. Attach Form 1116 if required	47	0		
48	Credit for child and dependent care expenses. Attach Form 2441	48			
49	Credit for the elderly or the disabled. Attach Schedule R	49			
50	Education credits. Attach Form 8863	50			
51	Retirement savings contributions credit. Attach Form 8880	51	0		
52	Residential energy credits. Attach Form 5695	52			
53	Child tax credit (see instructions). Attach Form 8901 if required	53			
54	Credits from: a ☐ Form 8396 b ☐ Form 8839 c ☐ Form 8859	54	0		
55	Other credits: a ☐ Form 3800 b ☐ Form 8801 c ☐ Form _____	55	0		
56	Add lines 47 through 55. These are your **total credits**			56	0
57	Subtract line 56 from line 46. If line 56 is more than line 46, enter -0- ▶			57	4,314

Other Taxes

58	Self-employment tax. Attach Schedule SE	58	0
59	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	59	0
60	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	60	0
61	Advance earned income credit payments from Form(s) W-2, box 9	61	0
62	Household employment taxes. Attach Schedule H	62	0
63	Add lines 57 through 62. This is your **total tax** ▶	63	4,314

Payments

If you have a qualifying child, attach Schedule EIC.

64	Federal income tax withheld from Forms W-2 and 1099	64	5,375		
65	2006 estimated tax payments and amount applied from 2005 return	65	0		
66a	**Earned income credit (EIC)**	66a			
b	Nontaxable combat pay election ▶ 66b				
67	Excess social security and tier 1 RRTA tax withheld (see instructions)	67	0		
68	Additional child tax credit. Attach Form 8812	68			
69	Amount paid with request for extension to file (see instructions)	69			
70	Payments from: a ☐ Form 2439 b ☐ Form 4136 c ☐ Form 8885	70	0		
71	Credit for federal telephone excise tax paid. Attach Form 8913 if required	71			
72	Add lines 64, 65, 66a, and 67 through 71. These are your **total payments** ▶			72	5,375

Refund

Direct deposit? See instructions and fill in 74b, 74c, and 74d, or Form 8888.

73	If line 72 is more than line 63, subtract line 63 from line 72. This is the amount you **overpaid**			73	1,061
74a	Amount of line 73 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐			74a	1,061
▶ b	Routing number 063000047 ▶ c Type: ☒ Checking ☐ Savings				
▶ d	Account number 005499102365				
75	Amount of line 73 you want **applied to your 2007 estimated tax** ▶	75	0		

Amount You Owe

76	**Amount you owe.** Subtract line 72 from line 63. For details on how to pay, see the instructions ▶			76	
77	Estimated tax penalty (see instructions)	77			

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☐ **Yes**. Complete the following ☒ **No**

Designee's name ▶ Phone no. ▶ Personal indentification number (PIN) ▶

Sign Here

Joint return? See instructions. Keep a copy for your records.

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
		Automotive Technician	423-488-5315
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	

Paid Preparer's Use Only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed), address, and ZIP code ▶			EIN
			Phone no.

SCHEDULES A&B
(Form 1040)
Department of the Treasury
Internal Revenue Service (99)

Schedule A—Itemized Deductions

(Schedule B is on page 2)

► **Attach to Form 1040.** ► **See Instructions for Schedules A&B (Form 1040).**

OMB No. 1545-0074
2006
Attachment Sequence No. **07**

Name(s) shown on Form 1040	Your social security number
Jeremy Q Peterson	414-45-3120

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1	0		
	2	Enter amount from Form 1040, line 38 | 2 | 40,775				
	3	Multiply line 2 by 7.5% (.075)	3	3,058		
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	0
Taxes You Paid (See instructions.)	5	State and local income taxes	5	0		
	6	Real estate taxes (see instructions)	6	0		
	7	Personal property taxes	7	0		
	8	Other taxes. List type and amount ►	8	0		
	9	Add lines 5 through 8			9	0
Interest You Paid (See instructions.)	10	Home mortgage interest and points reported to you on Form 1098	10	0		
	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 ►	11	0		
Note: Personal interest is not deductible.	12	Points not reported to you on Form 1098. See instructions for special rules	12	0		
	13	Investment interest. Attach Form 4952 if required. (See instructions.)	13			
	14	Add lines 10 through 13			14	0
Gifts to Charity If you made a gift and got a benefit for it, see instructions.	15	Gifts by cash or check. If you made any gift of $250 or more, see instructions	15			
	16	Other than by cash or check. If any gift of $250 or more, see instructions. You **must** attach Form 8283 if over $500	16			
	17	Carryover from prior year	17			
	18	Add lines 15 through 17			18	
Casualty and Theft Losses	19	Casualty or theft loss(es). Attach Form 4684. (See instructions.)			19	0
Job Expenses and Other Miscellaneous Deductions (See instructions.)	20	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►	20	7,248		
	21	Tax preparation fees	21			
	22	Other expenses—investment, safe deposit box, etc. List type and amount ►	22	0		
	23	Add lines 20 through 22	23	7,248		
	24	Enter amount from Form 1040, line 38 | 24 | 40,775				
	25	Multiply line 24 by 2% (.02)	25	816		
	26	Subtract line 25 from line 23. If line 25 is more than line 23, enter -0-			26	6,432
Other Miscellaneous Deductions	27	Other—from list in the instructions. List type and amount ►			27	0
Total Itemized Deductions	28	Is Form 1040, line 38, over $150,500 (over $75,250 if married filing separately)? ☒ **No.** Your deduction is not limited. Add the amounts in the far right column for lines 4 through 27. Also, enter this amount on Form 1040, line 40. ☐ **Yes.** Your deduction may be limited. See instructions for the amount to enter. ►			28	6,432
	29	If you elect to itemize deductions even though they are less than your standard deduction, check here ► ☐				

Form **2106**

Department of the Treasury
Internal Revenue Service (99)

Employee Business Expenses

▶ See separate instructions.

▶ Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

2006

Attachment Sequence No. **54**

Your name	Occupation in which you incurred expenses	Social security number
Jeremy Q Peterson	Automotive Technician	414-45-3120

Part I Employee Business Expenses and Reimbursements

Step 1 Enter Your Expenses		Column A Other Than Meals and Entertainment	Column B Meals and Entertainment
1 Vehicle expense from line 22 or line 29. (Rural mail carriers: See instructions.)	1	0	
2 Parking fees, tolls, and transportation, including train, bus, etc., that **did not** involve overnight travel or commuting to and from work	2	1,148	
3 Travel expense while away from home overnight, including lodging, airplane, car rental, etc. **Do not** include meals and entertainment	3		
4 Business expenses not included on lines 1 through 3. **Do not** include meals and entertainment	4	6,100	
5 Meals and entertainment expenses (see instructions)	5		
6 **Total expenses.** In Column A, add lines 1 through 4 and enter the result. In Column B, enter the amount from line 5	6	7,248	

Note: *If you were not reimbursed for any expenses in Step 1, skip line 7 and enter the amount from line 6 on line 8.*

Step 2 Enter Reimbursements Received From Your Employer for Expenses Listed in Step 1			
7 Enter reimbursements received from your employer that were **not** reported to you in box 1 of Form W-2. Include any reimbursements reported under code "L" in box 12 of your Form W-2 (see instructions)	7	0	

Step 3 Figure Expenses To Deduct on Schedule A (Form 1040)			
8 Subtract line 7 from line 6. If zero or less, enter -0-. However, if line 7 is greater than line 6 in Column A, report the excess as income on Form 1040, line 7 (or on Form 1040NR, line 8)	8	7,248	0
Note: *If **both columns** of line 8 are zero, you cannot deduct employee business expenses. Stop here and attach Form 2106 to your return.*			
9 In Column A, enter the amount from line 8. In Column B, multiply line 8 by 50% (.50). (Employees subject to Department of Transportation (DOT) hours of service limits: Multiply meal expenses incurred while away from home on business by 75% (.75) instead of 50%. For details, see instructions.)	9	7,248	0

10 Add the amounts on line 9 of both columns and enter the total here. **Also, enter the total on Schedule A (Form 1040), line 20** (or on Schedule A (Form 1040NR), line 9). (Reservists, qualified performing artists, fee-basis state or local government officials, and individuals with disabilities: See the instructions for special rules on where to enter the total.) ▶	10	7,248

SUPPORTING FORMS

RE: 2006 Tax Returns

PREPARED FOR: Jeremy Peterson **SSN:** 414-45-3120

PRINTED ON: May 03, 2007

PREPARED USING: TaxCut [8201]

SUPPORTING FORMS WHICH CAN BE SUBMITTED TO THE IRS

SUPPORTING FORMS IN YOUR RETURN

1. - Background Worksheet - Background Information Worksheet
2. - Form 1099-INT/OID - Interest Income Worksheet
3. - Non-W2 Wages - Worksheet for Wages Not on a W-2

****************** DO NOT MAIL THIS PAGE ******************

1. YOUR NAME, ADDRESS AND TELEPHONE NUMBER

Your name (first, MI, last, Jr/III) . . . . Jeremy Q Peterson
Spouse's name (first,MI,last,Jr/III) . . . .
C/O information, if necessary . . . .
Your street and apartment # (if any) . . . . 2313 Covey Lane
Your city, state, and ZIP code . . . . Chattanooga , TN 37421
Your telephone number (daytime) 423-488-5315
Spouse's telephone number (daytime) . . . .
Your telephone number (home) 423-488-5315

- ☐ The IRS is asking for daytime phone numbers. X here if you do not want us to enter your phone number on Form 1040 or Form 1040A. The IRS says entering the phone number is optional, but some states require it.
- ☐ X here if this is a foreign address (not APO/FPO).
- ☐ X here if you live outside the U.S. and Puerto Rico and your main place of work is outside the U.S. and Puerto Rico, or if you're in military or naval service outside the U.S. and Puerto Rico.
- ☐ X here if you had a hurricane retirement distribution in 2005 or 2006.
- ☐ X here if you housed a victim of Hurricane Katrina.
- ☐ X here if you, your spouse, or a dependent attended college or post-secondary school in the Gulf Opportunity Zone (GO Zone).

2. GENERAL INFORMATION

	Yours	Your spouse's
a. Social Security number	414-45-3120	
b. Date of birth (MM/DD/YYYY)	08/20/1984	
c. "X" if legally blind	☐	☐
d. Enter "X" if disabled	☐	☐
e. Occupation	Automotive Technician	
f. "X" if you want $3 to go to Pres. Elec. Campaign Fund	☐	☐
	Primary taxpayer	**Spouse**
g. If this return is for a deceased person, enter the date of death		

3. FILING STATUS

a. Choose your filing status below:

- ☒ Single
- ☐ Married filing joint return
- ☐ Married filing separate return
- ☐ Head of household
- ☐ Qualifying widow(er)

b. If you are married filing separately, check the applicable box.
I want to itemize my deductions . . . . ☐
I want to use the standard deduction . . . . ☐

c. Check the box if you are married filing separately **AND** you and your spouse lived apart throughout 2006 . . . . ☐

d. If filing status is head of household, and qualifying person is a child but not your dependent, enter the child's name . . . .
and SSN . . . .
Click here to clear or make a new selection . . . . ☐

e. If qualifying widow(er), enter the year your spouse died . . . .

f. Dual-Status Alien: Enter "X" if you or your spouse is a dual-status alien **AND** you are NOT entering on this tax return your combined worldwide income. If you enter "X," your standard deduction is zero . . . . ☐

AND you are NOT entering on this tax return your combined worldwide income. If you enter "X," your standard deduction is zero . . . . ☐

Jeremy Q Peterson **SSN:** 414-45-3120

4. EXEMPTIONS FOR YOU AND YOUR SPOUSE

a. Place an "X" here if anyone else (a parent, e.g.) can claim you as a dependent on his or her tax return. (Joint filers enter "X" only if someone else can claim you, **AND** your tax before withholding is zero.) . . . . ☐

b. Enter "Y" if you are entitled to an exemption for yourself . . . . Y

c. If married, place an "X" here if anyone else (a parent, e.g.) can claim **your spouse** as an exemption on his or her tax return. (Joint filers enter "X" only if someone else can claim your spouse, **AND** your tax before withholding is zero.) . . . . ☐

d. Enter "X" if you are entitled to an exemption for your spouse . . . . ☐

5. TAXES PAID/WITHHELD

a. Estimated taxes paid (do not include 2005 refund applied):

Date	**Amount**

Total estimated tax payments 0

b. Amount paid with Form 4868 (for October returns) . . . .

c. Withholding on Form 1099-B . . . .

d. Withholding on Form 1099-PATR . . . .

6. PAYING YOUR TAXES BY CREDIT CARD

a. Confirmation number, if taxes are being paid by credit card.

b. Amount charged to credit card (not including convenience fee), if taxes are being paid by credit card . . . .

7. REFUND INFORMATION

Direct Deposit

Would you like to speed your refund by having the IRS deposit it directly into your account at a bank or other financial institution in the United States? If so, fill in the following regarding the account and place an X here . . . . ☒

a. Routing Transit Number ("RTN") 063000047

b. Depositor Account Number ("DAN") 005499102365

Note: *Here is a sample of the numbers you might find at the bottom of a check, with "RTN," "DAN," and check number identified.*

RTN:	DAN:	Check number:
123404567	**123-4567**	**0101**

c. Type of account:

☒ Checking ☐ Savings

Applying Refund to Your 2007 Estimated Tax

If you are due a refund this year, do you want to apply any of it to 2007 estimated tax? If so, please enter the amount here estimated tax? If so, please enter the amount here ______

Jeremy Q Peterson **SSN:** 414-45-3120

8. THIRD PARTY DESIGNEE

Do you want to allow another person to discuss this return with the IRS? ☐ **Yes** ☒ **No**

If **Yes,** *complete the following information:*

Designee's name: ______

Designee's phone number: ______

Designee's personal identification number (PIN): ______

9. RETURN ASSISTANCE

How was this return prepared:

☒ By yourself.

☐ With help of an IRS-sponsored program (if so, enter one of the following: TC, TCE, TC-X, TCE-X, VITA, VITA-T, Self-Help, IRS-Prepared, IRS-Reviewed, Outreach): ______.

10. STATE TAX RETURNS

Enter information below about any 2006 state tax returns you're filing.
For each state, select the residency status that applies for 2006.

Name of state(s)	Residency status
TN	Full-year resident

FORM 1099-INT/OID **INTEREST INCOME WORKSHEET** **2006**

Is this interest for:

☒ You ☐ Your spouse ☐ Both of you

Interest paid by: Bank of America

FORM 1099-INT

Box 1 -	Interest income:	$ 85.26
Box 2 -	Early withdrawal penalty:	$
Box 3 -	Interest on U.S. Savings Bonds and Treasury obligations:	$
	Box 3 includes Series EE or I Savings Bond interest . . . . ☐	
Box 4 -	Federal income tax withheld:	$
Box 5 -	Investment expenses:	$
Box 6 -	Foreign tax paid:	$
Box 7 -	Foreign country or U.S. possession:	
Box 8 -	Tax-exempt interest:	$
Box 9 -	Specified private activity bond interest:	$

FORM 1099-OID

Box 1 -	Original issue discount for 2006:	$
Box 2 -	Other periodic interest:	$
Box 3 -	Early withdrawal penalty:	$
Box 4 -	Federal income tax withheld:	$
Box 6 -	Original issue discount on U.S. Treasury obligations:	$
Box 7 -	Investment expenses:	$

SELLER-FINANCED MORTGAGE INTEREST

Buyer's name . . . .

Buyer's Social Security number . . . .

Buyer's address . . . .

Interest received in 2006 . . . .

ADJUSTMENTS

- ☐ Nominee interest
- ☐ OID adjustment
- ☐ Accrued interest adjustment required
- ☐ Amortizable bond premium
- ☐ U.S. Savings Bond adjustment (not the same as Form 8815 adj.)
- ☐ Other adjustment (frozen deposit, etc.)

Amount of adjustment:

NON-W2 WAGES	WORKSHEET FOR WAGES NOT ON A W-2	2006
Jeremy Q Peterson		SSN: 414-45-3120

		You	Spouse
1	Wages received as a household employee		
2	Unreported tip income and allocated tips (Form 4137)		
3	Taxable dependent care benefits (Form 2441 or Sch 2)	0	0
4	Taxable employer-provided adoption benefits	0	0
5	Taxable scholarship and fellowship grants		

MINI-WORKSHEET FOR EXCESS SALARY DEFERRALS

		You	Spouse
a.	Total deferred compensation from W-2's		
b.	Tentative limitation amount		
c.	Actual limitation amount (if different from line b above)		
d.	Excess salary deferrals (line a minus line b; but if line c > 0, then line a minus line c).		
e.	Excess salary deferrals reported on 1099-R		
	Note: *Make an entry on line e if a plan distribution was reported on Form 1099-R with code 8 in box 7, and the distribution included excess salary deferrals (other than Roth 401(k)/403(b) deferrals).*		
f.	Net excess salary deferrals (ln d - ln e)		
g.	Roth 401(k)/403(b) contributions		
h.	Excess Roth 401(k)/403(b) contributions (line g minus line b; but if line c > 0, line g minus line c)		
i.	Line f minus line h (not <0). To line 6		

		You	Spouse
6	Excess salary deferrals		
7	Pre-retirement disability pensions (Form 1099-R)	0	0
8	Corrective retirement plan distrib (Form 1099-R)	0	0
9	Compensation reported on a 1099-MISC	0	0
10	Excess reimbursements of employee business expenses	0	0
11	Excess reimbursements of moving expenses	0	0
12	Foreign earned income (Form 2555-EZ)	0	0
13	Other wage-type income		
14	Total	0	0

COVER PAGE

Filing Checklist For 2006 Tax Return Filed On Standard Forms

Prepared on: 05/03/2007 11:53:05 pm

Return: C:\Documents and Settings\Jeremy Peterson\My Documents\TaxCut\Jeremy Peterson's Taxes.T06

To file your 2006 tax return, simply follow these instructions:

Step 1 - Sign and date the return

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2 - Assemble the return

These forms should be assembled behind Form 1040 --U.S. Individual Income Tax Return

- Schedule A
- Form 2106

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (Sonic Automotive of Chattanooga)

2nd (Best Buy Stores LP)

Step 3 - Mail the return

Mail the return to this address:

Internal Revenue Service Center
Austin, TX 73301-0002

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.
- DHL Same Day Service, Next Day 10:30 am, Next Day 12:00 pm, Next Day 3:00 pm, or 2nd Day Service.
- FedEx Priority Overnight, Standard Overnight, 2Day, International Priority, or International First.
- United Parcel Service Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 4 - Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- - Background Worksheet
- - Form 1099-INT/OID
- - Non-W2 Wages

2006 Tax Return Information. Keep this for your records.

Here is some additional information about your 2006 return. Keep this information with your records. You will need your 2006 AGI to electronically sign your return next year.

Quick Summary

Total (Gross) Income	$40,775
Adjusted Gross Income	40,775
Taxable Income	31,043
Total Federal Tax	4,314
Total Payments	5,375
Penalties	0
Refund Amount	1,061
Amount You Owe	$0

Form 1040 Department of the Treasury--IRS 2006
US INDIVIDUAL INCOME TAX RETURN

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For the year Jan 1-Dec 31, 2006 or other year from to OMB No.1545-0074

		1st Name, initial		Last Name	Jr	
LABEL (Use IRS label)	Your Name:	Jeremy	Q	Peterson		414-45-3120
	Spouse Name:					
	Street, No:	2313 Covey Lane				Enter your SSN(s) above
	City,ST,ZIP:	Chattanooga		TN 37421		

Presidential Elec Campaign **Note:** Checking a box below won't change your tax or refund.
Check if you/spouse want $3 to go to fund . . . . ☐ **You** ☐ **Spouse**

Filing Status Check one box.
1 ☒ Single
2 ☐ Married filing jointly (even if only one had income)
3 ☐ Married filing separately
Spouse name
4 ☐ Head of hshld. If qual person a child but not your dependent, child's name:
5 ☐ Qual widow w/dep child

Exemptions
6a ☒ **Yourself** (but **NOT** if you can be someone's dependent)
b ☐ **Spouse** . . ● **6a+6b** 1

c **Dependents:**

(1) First	Last Name	(2) SSN	(3) Relationship	(4) Crdt
				☐
				☐
				☐
				☐

If > 4 dependents, see inst.

 # Children Lived w/ you . . .
●# **Apart - div** . . . .
Other .

d Total number of exemptions claimed . . . . .Add nos. above 1

MINI-WORKSHEET FOR LINE 7, WAGES

a. Wages not on W-2 . . . . .Self: 0 Spouse: 0
b. Total from line a 0
Note: *Line b includes spouse amounts only if you are married filing a joint return.*
c. Wages from W-2's 40,690
d. Total for line 7 40,690

Income **Attach copy B**

7	Wages, etc	7	40,690
8a	**Taxable** interest income. (Sch B if required)	8a	85
b	**Tax-exempt** interest 8b 0		
9a	Ordinary dividends	9a	0
b	Qual divs 9b 0		

MINI-WORKSHEET FOR LINE 10, TAXABLE REFUNDS OF STATE AND LOCAL INCOME TAXES

Note: *This mini-worksheet requires certain information from your 2005 income tax return. If you did not create this tax return using last year's tax data, complete the Last Year's Data Worksheet before continuing.*

a. Sum of "special case" amounts from Forms 1099-G (based on Pub. 525) . . . . .a. 0
(If so, see IRS Pub. 525 and enter your taxable refunds manually on line 10.)

b. Amount of refunds (up to diff betw deds):
i. Refunds received (Form 1099-G) 0
Check to use amount on line i . . . . ☒
Check to calculate limit on taxable amt . . . . ☐

Limitation on Taxable Amount

TaxCut load last year users who calculated (but did not use) sales tax deduction in 2005:
1. Sales tax you could have deducted in 2005 . . . .
Line 1 comes from the Last Year's Data Worksheet. We blank out lines 2 - 9 if line 1 is calculated.
Others:
2. 2005 number of exemptions . . . .
3. 2005 adjusted gross income . . . .
4. 2005 nontaxable income . . . .
5. 2005 total available income . . . .
6. 2005 states of residence:

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(1) 2005 state at year-end . . . .
2005 locality . . . . . .
2005 state general sales tax rate . . . . %
CA and NV: *Enter your 2005* **combined** *state and local general sales tax rate on the following line.*
VA and Texarkana, AR: *We calculate the following line for you.*
2005 local general sales tax rate . . . . %

(2) 2005 other state . . . .
2005 dates of residence in other state:
From ____________ to ____________
2005 locality . . . . . .
2005 state general sales tax rate . . . . %
CA and NV: *Enter your 2005* **combined** *state and local general sales tax rate on the following line.*
VA and Texarkana, AR: *We calculate the following line for you.*
2005 Local general sales tax rate . . . . %

7. 2005 total from tables . . . .
8. 2005 sales tax for major purchases . . . .
9. 2005 state and local sales tax ded (line 7 + line 8) . . . .
10. 2005 state and local inc tax ded . . . .
11. Ln 10 minus ln 9 (or line 1, if applicable) . . . .
12. Smaller of lines b(i) and 11 . . . .

ii. Line b(i) or 12 . . . . **b.**

Note: *We carry line 12 to line b if you indicate that you want to calculate the difference between your 2005 income and sales tax deductions. Otherwise we carry line b(i) to line b.*

c. Itemized deductions allowed in 2005 . . . . **c.**
d. 2005 filing status . . . . **d.**
If line d is "3", "X" if itemizing . . . .
e. 2005 minimum standard deduction . . . . **e.**
f. Number of boxes x'd on 2005 Form 1040, line 39a . . . . **f.**
g. Ln f x $1000 ($1250 if ln d is 1 or 4) . . . . **g.**
h. 2005 standard deduction (ln e + ln g) . . . . **h.**
Note: *We blank line h if line d is X'd.*
i. Line c - line h (not < 0) . . . . **i.**
j. Smaller of line b or line i . . . . **j.**
k. Sum of lines a and j (to line 10) . . . . **k.** 0

of W-2, W-2G, & 1099-R here.	**10**	Taxable refunds of state and local income taxes	**10**	0
	11	Alimony received	**11**	
	12	Business income or loss. Attach Sched C or C-EZ	**12**	0
	13	Capital gain/loss	**13**	0
	14	Other gains or losses. Attach Form 4797	**14**	
Enclose, but don't attach, payment. Please use Form 1040-V.	**15a**	IRA distribs. **15a** **b** Taxbl	**15b**	0
	16a	Pension,annuities **16a** **b** Taxbl	**16b**	0
	17	Rent, royalty, partnership, S corp, trust (Sch E)	**17**	
	18	Farm income or loss. Attach Schedule F	**18**	0
	19	Unemployment compensation	**19**	
	20a	Soc Sec benefits . . . . **20a** **b** Taxable . .	**20b**	
	21	Other income (type and amt)	**21**	0
	22	Add lines 7 through 21. Your **total income**	**22**	40,775

Note: *Your educator expense deduction, if any, is included on line 23. It is designated with code "E" (code "B" if you have both the Archer MSA deduction and the educator expense deduction).*

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Adjusted	**23**	Archer MSA deduction (Fm 8853)	**23**	0
	24	Certain bus expenses of reservists, artists, fee-basis gov't officials	**24**	0
	25	Health savings acct ded (Fm 8889)	**25**	0
	26	Moving exps (Form 3903)	**26**	0
	27	1/2 of self-empl tax (Sched SE)	**27**	0
	28	SE SEP/SIMPLE/qualified plans. . .	**28**	0

MINI-WORKSHEET FOR LINE 29, SELF-EMPLOYED HEALTH INSURANCE DEDUCTION

a. Total paid in 2006 for 2006 health insurance coverage established under your business for you, your spouse and dependents . . . . ______

Note: *Do not include amounts for any month you were eligible for an employer's plan.*

Note: *See the IRS instructions if, during 2006, you were an eligible trade adjustment assistance (TAA) recipient, alternative TAA recipient, or Pension Benefit Guaranty Corporation pension recipient.*

b. Amount from Schedule K-1, line 13 0

c. Line a plus line b 0

d. Check here if the business under which the insurance plan was established was an S corp., and you were a more-than-2% shareholder in the S corp . . . . ☐

e. Net profit and any other earned income from the business under which the insurance plan is established, less 1040 lines 27 and 28 0

Note: *We calculate line e for you in most cases. However, if you have more than one source of self-employment income, or if you are filing Form 2555 or Form 2555-EZ, use the worksheet in Chapter 7 of IRS Publication 535 to figure your entry for line e. If you checked box d., enter your wages from the S corp. on line e.*

f. Smaller line c or e (for line 29) 0

	29	Self-employed health ins deduction	**29**	0
	30	Penalty on early w/drawal of svgs	**30**	0
	31a	Alimony pd . . **b**Recip SSN ▶	**31a**	

MINI-WORKSHEET FOR LINE 32, IRA DEDUCTION

a. Your IRA deduction 0

b. Your spouse's IRA deduction 0

c. Total (to line 32) 0

Gross	**32**	IRA deduction (see instructions)	**32**	0

MINI-WORKSHEET FOR LINE 33, STUDENT LOAN INTEREST DEDUCTION

Note: *If you are claimed as a dependent on someone else's return, or if you are married filing a separate return, you are not eligible for this deduction.*

a. Qualifying interest . . . . ______

b. Maximum interest deduction . . . . ______

c. Eligible interest. Smaller line a or b . . . . ______

d. Total income (Form 1040 line 22) . . . . ______

e. Total of amounts from Form 1040, lines 23 through 32, line 34, and amount to left of line 36) . . . . ______

f. Foreign earned income and housing deduction . . . . ______

g. Income excluded from Puerto Rico, Guam, American Samoa, or N. Mariana Islands . . . . ______

h. Modified AGI. Ln d - ln e + lns f and g . . . . ______

i. Phaseout threshold ($50,000; $105,000 jnt) . . . . ______

j. Line h - line i . . . . ______

k. Reduction amount (line c times line j divided by $15,000 if not joint, $30,000 joint) . . . . ______

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l.	Deduction (line c - line k). To line 33	

Income

33	Student loan interest deduction	**33**	
34	Jury duty pay given to employer	**34**	

MINI-WORKSHEET FOR LINE 35
TUITION AND FEES DEDUCTION

Note: *If you can be claimed as a dependent on someone else's return, or if you are married filing a separate return, you are not eligible for this deduction.*

Note: *You are not eligible for this deduction unless you were a U.S. citizen or resident alien for all of 2006* **or** *you were a nonresident alien for any part of 2006 and you are filing a joint return.*

a.	Qualified tuition and fees from Tuition Payments Worksheet, up to $4,000, or up to $2,000 for modified AGI over $65,000 ($130,000 for MFJ)	0
b.	Form 1040, line 22	40,775
c.	Form 1040, lines 23 through 34, plus amount to left of line 36	0
d.	Foreign earned income and housing deduction	0
e.	Income excluded from Puerto Rico, Guam, American Samoa, or N. Mariana Islands	0
f.	Modified AGI. Ln b - ln c + lns d and e	40,775

g. Is line f. more than $80,000 ($160,000 if married filing jointly)?

- ☐ **Yes.** You can't take the deduction for tuition and fees.
- ☒ **No.** Include the amount from line a on line 35 below (along with dom. prod. act. ded., if any).

Note: *Your tuition and fees deduction, if any, is included on line 35. It is designated with code "T" (code "B" if you have both the domestic production activities deduction and the tuition and fees deduction).*

35	Dom. prod. act. ded. (Fm 8903)	**35**	0		
36	Lns 23-31a, 32-35			**36**	0
37	Line 22 - line 36. Your **adjusted gross income**			**37**	40,775

KIA

END OF PAGE 1

Jeremy Q Peterson SSN: 414-45-3120

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Tax and Credits

38	Amount from line 37 (adjusted gross income)	38	40,775
39a	☐ You born before Jan 2, 1942 ☐ Blind ☐ Sp born before Jan 2, 1942 ☐ Blind	39a	0

MINI-WORKSHEET FOR LINE 39b

a. Married, filing separately and spouse itemizes ☐

b. Are you a dual-status alien ☐

b	Sp itemizes on sep rtn/dual-status alien	39b ☐	

MINI-WORKSHEET FOR LINE 40, STANDARD VS ITEMIZED DEDUCTION

a.	Your standard deduction (calculated)	5,150
b.	Itemized deductions (from Schedule A)	6,432
c.	"X" if you are required to itemize (calculated)	☐
d.	"X" if you want to itemize, even if lower deduction	☐
e.	"X" if you are married filing separately and are taking the standard deduction (calculated)	☐
f.	Larger of a. and b. (or, if c or d is "X", then b; if e is "X", then a) Carry to line 40	6,432

40	**Itemized deductions** or **standard deduction**	40	6,432
	Check here if you itemized ☒		
41	Subtract line 40 from line 38	41	34,343

MINI-WORKSHEET FOR PERSONAL EXEMPTIONS

a. Is amount on line 38 more than amount shown below on line d. for your filing status?

☒ **No.** Stop. Multiply $3,300 by line 6d and enter result on line 42.

☐ **Yes.** *Continue.*

b. Line 6d multiplied by $3,300

c. Amount on Line 38

d. Ceiling amount

Married, filing jointly or Qualifying widow(er) 225,750

Married filing separately 112,875

Single 150,500

Head of household 188,150

e. Line c. minus line d

f. Is line e. more than $122,500 ($61,250 if married filing separately)?

☐ **Yes.** Multiply $1,100 by line 6d and enter result on line 42.

☐ **No.** Divide line e. by $2,500 ($1,250 if married filing separately)

g. Line f. multiplied by 2% (.02)

Note: *We limit line g. to 1.00.*

h. Line b. multiplied by line g

i. Line h. divided by 1.5

j. **Deduction for exemptions.** Line b minus line i (to line 42)

Note: *If you provided housing to a person displaced by Hurricane Katrina, see IRS instr.*

42	Deduction for exemptions (see worksheet)	42	3,300
43	**Taxable income.** Ln 41 minus 42 (not less than 0)	43	31,043

FOREIGN EARNED INCOME TAX WORKSHEET

a. Form 1040, line 41

b. Form 1040, line 42

c. Line a minus line b

d. Form 2555, line 45, or Form 2555-EZ, line 18

e. Total amount of itemized deductions you couldn't claim because they are related to excluded income

f. Line d minus line e. If zero or less, enter 0

g. Combine lines c. and f. If zero or less, enter 0

h. Tax on line g

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i.	Tax on line f			
j.	Line h. minus line i. If zero or less, enter 0			
44	**Tax.** See instructions. Check if total includes tax from **a** ☐ Form(s) 8814 **b** ☐ Frm 4972		44	4,314
45	**Alternative minimum tax.** (Form 6251)		45	0
46	Add lines 44 and 45		46	4,314

MINI-WORKSHEET FOR LINE 47, FOREIGN TAX CREDIT

a.	Foreign tax credit from Form(s) 1099-DIV, 1099-INT, and Schedule(s) K-1 (partnerships/S corps)	0
	Note: *We blank line a if you use Form(s) 1116.*	
b.	Smaller of line a. and line 44	0
c.	Foreign tax credit from Form(s) 1116	0
d.	Line b + line c. To line 47	0

47	Foreign tax credit (1116 if req'd)	47	0		
48	Child care credit (Form 2441)	48			
49	Credit for elderly (Schedule R)	49			
50	Education credits (Form 8863)	50			
51	Retirement savings crdt (Fm 8880)	51	0		
52	Residential energy crdts (Fm 5695)	52			
53	Child tax crdt (Fm 8901 if req)	53			
54	Credits. Check: **a** ☐ Form 8396 **b** ☐ Form 8839 **c** ☐ Form 8859	54	0		
55	Other credits. Check: **a** ☐ Frm 3800 **b** ☐ Form 8801 **c** ☐ Specify	55	0		
56	Add lines 47 through 55. Your **total credits**			56	0
57	Subtract line 56 from line 46 (not less than 0)			57	4,314
Other Taxes 58	Self-employment tax. (Sched SE)			58	0
59	Soc Sec tax on unreported tip income (Form 4137)			59	0
60	Tax on IRAs, qualified plans, etc. (Form 5329)			60	0
61	Advance earned income credit payments (Form W-2)			61	0
62	Household employment taxes. Attach Schedule H			62	0
63	Lns 57 to 62. **Total tax**			63	4,314

MINI-WORKSHEET FOR LINE 64, FEDERAL TAX WITHHELD

a.	Backup withholding (Bkgd Wks, 1099-DIV, 1099-INT/OID, 1099-MISC, K-1)	0
b.	Oth fed inc tax w/h (W-2, W-2G, 1099-G, 1099-R, SSA-1099, RRB-1099)	5,375
c.	Total federal income tax withheld (to line 64)	5,375

Pay-ments 64	Federal income tax withheld	64	5,375
65	2006 est tax + amt from 05 return	65	0
66a	**Earned inc crdt.**	66a	
b	Nontax combat pay 66b		
	Note: *Attach Schedule EIC if you have a qualifying child.*		

MINI-WORKSHEET FOR LINE 67, EXCESS SOC SEC AND RRTA

(Fill in W-2's first; leave blank unless 2 or more employers.)

a.	"X" if more than 1 employer.	Self:	☒	Spouse:	☐
b.	Eligible Soc Sec tax paid.	Self:	2,523	Spouse:	
c.	If a="X", amt on b - $5840.	Self:	0	Spouse:	
d.	Total on line c. Carry to ln 67			TOTAL:	0

67	Excess Soc Sec & RRTA tax withheld	67	0		
68	Additional child tax credit (8812)	68			
69	Amt pd with extension request	69			
70	Pymts: ☐ 2439 ☐ 4136 ☐ 8885	70	0		
71	Fed phone excise tax crd (Fm 8913)	71			
	Note: *Go to Form 8913 to claim the phone excise tax credit.*				
72	Lns 64, 65, 66a, 67-71. **Total payments**			72	5,375
Refund 73	If line 72 is larger than line 63, amt **overpaid**			73	1,061

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		If line 72 is larger than line 63, amt **overpaid**		
Direct	**74a**	Amount of line 73 you want refunded to you. Check if Form 8888 is attached: ☐	**74a**	1,061
deposit?	**b**	Routing number 063000047 **c** Type: ☒ Checking ☐ Savings		
See	**d**	Account number 005499102365		
instr.	75	Amt to **apply to 2007 estimated tax** **75** 0		
Amount	76	**Amount you owe** (including Form 2210 penalty) . . . . **Note:** *For details on how to pay, see IRS instr. Payment Voucher, see IRS instructions.*	**76**	
You Owe	77	Amount of penalty on Form 2210 . . . . **77**		

Desi-gnee Allow another to discuss return with IRS? ☐ **Yes.** Complete following ☒ **No**

Designee's name: Phone PIN

Note: *If you are signing for your child, sign his or her name, and write "By" and then your name, and then, "parent for minor child."*

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.

Sign here	Signature:	Date	Your occupation Automotive Technician	Day tel. 423-488-5315
	Spouse's sig (req'd if jt.)	Date	Spouse's occupation	
Keep a copy for your records.	Preparer's signature:	Date	Self-empl? ☐	SSN/PTIN
	Firm name/address			EIN
				Ph

END OF FORM

SCHEDULE A (Form 1040) | **ITEMIZED DEDUCTIONS** | **2006*07 OMB No. 1545-0074**

Not For Filing

Jeremy Q Peterson | **SSN:** 414-45-3120

Note: *If you and your spouse paid expenses jointly and are filing separate returns for 2006, see IRS Publication 504 to figure the portion of joint expenses that you can claim as itemized deductions.*

CAUTION: *Don't include medical expenses reimbursed or paid by others.*

MINI-WORKSHEET FOR LINE 1, MEDICAL EXPENSES

a.	Drug, doctor, dentist, hospital, premiums etc	
b.	Special items--glasses, transportation, etc	
c.	Self-employed health ins premium (from 1040)	0
d.	Total medical (a+b+c). Carry to line 1	0

MEDICAL	**1.** Medical and dental expenses (See instructions.)	**1**	0	
AND	**2.** Amount on 1040, line 38 ...... **2** 40,775			
DENTAL	**3.** Amount on line 2 times 7.5%	**3**	3,058	
EXPENSES	**4.** Line 1 minus line 3, but not less than zero	**4**		0

MINI-WORKSHEET FOR LINE 5, STATE AND LOCAL INCOME TAXES

a.	Taxes withheld (W-2, W-2G, 1099-R, 1099-G, 1099-MISC)	0
b.	Tax payments from State and Local Tax Payments Worksheet	0
c.	Total state and local taxes (a+b) for line 5	0

MINI-WORKSHEET FOR LINE 5, STATE AND LOCAL SALES TAXES

a. General sales taxes paid in 2006 on motor vehicles and other major purchases ....

b. Other general sales taxes paid in 2006 ....

c. Information for IRS Optional Sales Tax Tables

- **i.** Number of exemptions 1
- **ii.** Adjusted gross income 40,775
- **iii.** Tax-exempt interest and nontaxable social security and railroad retirement benefits 0
- **iv.** Other nontaxable income ....
- **v.** Total available income 40,775
- **vi.** States of residence:
  - **(1)** State at year-end .... TN
    - Locality ....
    - State general sales tax rate .... 7.0000 %
    - **CA and NV:** *Enter your* **combined** *state and local general sales tax rate on the following line.*
    - **VA and Texarkana, AR:** *We calculate the following line for you.*
    - Local general sales tax rate .... %
  - **(2)** Other state ....
    - Dates of residence in other state: From 01/01/2006 to
    - Locality ....
    - State general sales tax rate .... %
    - **CA and NV:** *Enter your* **combined** *state and local general sales tax rate on the following line.*
    - **VA and Texarkana, AR:** *We calculate the following line for you.*
    - Local general sales tax rate .... %

d. Total from tables 804

e. Larger of line b. or line d 804

f. Total sales tax for deduction (line a + line e) 804

Check which kind of state and local taxes you're deducting:

☐ Income taxes ☐ General sales taxes

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TAXES **5.** State and local income taxes **5** 0

MINI-WORKSHEET FOR LINE 6, REAL ESTATE TAXES

a.	Property tax from Rentals and Royalties Wksht	0
b.	Property tax from Forms 8829 for Sch C	0
c.	Property tax from Forms 1098	0
d.	Other real estate taxes you paid:	
i.	Amount #1	
ii.	Amount #2	
iii.	Amount #3	
e.	Total real estate taxes (a+b+c+d) for line 6	0

YOU **6.** Real estate taxes **6** 0

MINI-WORKSHEET FOR LINE 7, PERSONAL PROPERTY TAXES

a.	Personal property taxes from Vehicle Wksht	0
b.	Vehicle tax amount #1	
c.	Vehicle tax amount #2	
d.	Other personal property taxes you paid	
e.	Total pers. prop. taxes (a+b+c+d) for ln 7	0

PAID **7.** Personal property taxes **7** 0

MINI-WORKSHEET FOR LINE 8, OTHER TAXES

a.	Other taxes from Rentals & Royalties, K-1	0
b.	Occupational taxes. Amount carried to miscellaneous itemized expenses on line 22	
c.	Other taxes you paid	
	Note: *Do* **NOT** *enter any foreign taxes here if the total amount entered (or to be entered) on your 1099's and K-1's is $300 or less ($600 or less if filing jointly). If your foreign taxes are less than those amounts, we automatically carry the total to Form 1040 as a credit.*	
d.	Total other taxes (a+c) for line 8	0

8. Other taxes (list type and amount) ▶ **8** 0

9. Sum of lines 5 through 8. Total taxes **9** 0

Note: *Report on line 10 only interest that was reported to you on a Form 1098. Report other mortgage interest on lines 11 and 12.*

MINI-WORKSHEET FOR LINE 10, HOME MORTGAGE INTEREST FROM FORM 1098

a.	Interest and points shown on a Form 1098	0
b.	Less int/pts alloc'd through Rent/Rylty Wksht	0
c.	Less int/pts for home office on Sch. C	0
d.	Less int/pts for farm bus. on Sch. F	0
e.	Less mortgage interest credit (Form 8396)	0
f.	Total home mortgage interest for ln 10	0

INTEREST **10.** Interest and points shown on Form 1098 . . . . **10** 0

MINI-WORKSHEET FOR LINE 11, HOME MORTGAGE INTEREST NOT FROM FORM 1098

a.	Interest from Wksts not shown on a Form 1098	0
b.	Less interest alloc'd through Rent/Rylty Wkst	0
c.	Less interest for home office on Sch. C	0
d.	Less interest for farm bus. on Sch. F	0
e.	Less mortgage interest credit (Form 8396)	
f.	Total mortgage interest not on Form 1098	0

YOU PAID *Personal interest is not deductible.*

11. Other home mortgage interest.
Payee name, identifying #, address ▶ **11** 0

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MINI-WORKSHEET FOR LINE 12, POINTS NOT REPORTED ON FORM 1098

a.	Other points (not Form 1098 box 2) from Home Mortgage Interest worksheets	0
b.	Less points alloc'd through Rent/Rylty Wksht	0
c.	Less points for home office on Sch. C	0
d.	Less points for farm bus. on Sch. F	0
e.	Total deductible points (to line 12)	0

12. Points not reported to you on Fm 1098 . . . . **12** 0

Alternative Minimum Tax (AMT) Adjustments

a.	Home mortgage interest (lines 10-12) from post-6/30/82 debt NOT used to buy, build, etc. your "main home" or second home	
b.	Home mortgage interest (lines 10-12) from pre-7/1/82 debt which was not used to buy, build, etc. your "main home" or second home AND which was not secured by your "main home" or second home when the mortgage was taken out	
c.	Interest on a mortgage used to refinance to the extent the refinancing proceeds exceeded balance on refinanced mortgage	
d.	Total (a+b+c) added to line 4, Form 6251	0

Line 13: Form 4952 Not Needed?

Please check this box if you don't need to file Form 4952 (See IRS instructions) . . . . . . ☐
Then enter the amount of your deductible investment interest on Line 13 below.

	13.	Deductible investment interest (4952)	**13**		
	14.	Sum of lines 10 to 13. Total interest		**14**	0
GIFTS	**15.**	Gifts by cash or check	**15**		
TO	**16.**	Other than cash (Fm 8283 if over $500)	**16**		
		Note: *If any gift is $250 or more, see the IRS instructions.*			
CHARITY	**17.**	Carryover from prior year	**17**		
	18.	Sum of lns 15, 16, and 17. Total contributions		**18**	
		Note: *The amount on line 18 above comes from line 4 of Part VI of our Charitable Contributions Worksheet.*			
CASUALTY AND LOSS	**19.**	Casualty or theft loss(es). (Form 4684)		**19**	0

MINI-WORKSHEET FOR LINE 20, EMPLOYEE BUSINESS EXPENSES

Note: *Don't include on lines a. or b. below any tuition and fees deduction you claimed on* Form 1040, line 34.

a.	Unreimbursed employee expenses from Form 2106 and Form 2106-EZ	7,248
b.	If no Form 2106 or 2106-EZ, enter ordinary and necessary unreimbursed employee business expenses here	
	If you are filing electronically, enter a description of the expenses that appear on line b	
c.	Total unreimbursed expenses (to line 20)	7,248

JOB EXPENSES	**20.**	Unreimbursed employee expenses--job travel, dues. (Form 2106, 2106-EZ) Description ▶	**20**	7,248
	21.	Tax preparation fees	**21**	

MINI-WORKSHEET FOR LINE 22, MISCELLANEOUS EXPENSES SUBJECT TO 2% LIMIT

a. Safe deposit box fees

b.	Legal expenses for production of income	
c.	Investment exps from 1099-DIV, -INT, -OID	0
d.	Other investment expenses	
e.	Hobby loss expenses	
f.	Fees, subscriptions, tools	
g.	Losses in a bank failure	
h.	Miscellaneous itemized deductions from K-1	0
i.	Casualty, 4684, ln 35, 41b; 4797, ln 18a	0
	Note: *See Form 4684 and Form 4797 for more detailed information about the amounts that we carry to line 22i.*	
j.	Depreciation and vehicle expenses	0
k.	Occupational taxes from mini-worksheet for line 8	
l.	Other misc deductions subject to 2% limit	
m.	Total misc deductions (for line 22)	0

AND CERTAIN	22.	Other (describe):	22	0	
MISCEL-	23.	Sum of lines 20 to 22	23	7,248	
LANEOUS	24.	Amount from 1040, line 38	24	40,775	
DEDUC-	25.	2% of the amount on line 24	25	816	
TIONS	26.	Line 23 - line 25 (but not less than zero)	26		6,432

MINI-WORKSHEET FOR LINE 27, OTHER MISC EXPENSES

a.	Gambling losses (not more than winnings)	
b.	Gambling losses from K-1's	0
	Note: *Gambling losses can be deducted only to the extent of gambling winnings. If losses are too high, adjust them.*	
c.	Estate tax paid on "IRD"	0
d.	Repayments under a claim of right (>3000)	
e.	Unrecovered investment in pension	
f.	Impairment-related work expenses	0
g.	Amortization of certain bond premiums	
h.	Casualty, 4684, ln 35, 41b; 4797, ln 18a	0
	Note: *See Form 4684 and Form 4797 for more detailed information about the amounts that we carry to line 27h.*	
i.	Other misc dedns NOT subject to 2% limit	
j.	Total (lines a through i) (to line 27)	0

OTHER MISC. DEDUCTIONS	27.	Other misc. deductions. List type and amt	27	0

MINI-WORKSHEET FOR LINE 28, ITEMIZED DEDUCTIONS

Note: *This mini-worksheet ONLY applies if Form 1040, ln 38 exceeds $150,500 ($75,250 if married filing separately).*

a.	Sum of amounts on lines 4, 9, 14, 18, 19, 26, and 27		
b.	Sum of amounts on lines 4, 13, and 19 plus gambling and casualty or theft losses from line 27 mini-worksheet		
c.	Line a minus line b		
d.	Line c multiplied by 80% (.80)		
e.	Amount on line 38, Form 1040		
f.	Threshold amount ($150,500, or $75,250 if married filing separate)		
g.	Line e minus f (not less than 0)		
h.	Line g multiplied by 3% (.03)		
i.	Smaller of lines d and h		
j.	Divide line i. by 3		0
k.	Line i. minus line j		0

		l. Line a minus line k. (to line 28)		
TOTAL	**28.**	Lines 4,9,14,18,19,26, and 27. Total	**28**	6,432
	Note:	*Line 28 is carried to a worksheet on Form 1040 above line 40.*		
	29.	Check if itemizing even though less than std ded ☐		

KIA

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FORM 2106 (Form 1040)	EMPLOYEE BUSINESS EXPENSES	2006*54 OMB No. 1545-0139

Your name	Occupation	Soc Sec No
Jeremy Q Peterson	Automotive Technician	414-45-3120

Indicate whose Form 2106 this is: ☒ Self, or ☐ Spouse.

PART I - EMPLOYEE BUSINESS EXPENSES AND REIMBURSEMENTS

Use Column A for expenses other than meals and entertainment (lines 1-4).
Use Column B for meals and entertainment (line 5).

Step 1 Enter Your Expenses		Column A	Column B
1. Vehicle expense, from line 22 or 29	1	0	

MINI-WORKSHEET FOR LINE 2, PARKING FEES, TOLLS, LOCAL TRAINS, ETC.

Do not include expenses that involved overnight travel or commuting to and from work.

a.	Parking fees, local trains, buses, etc	1,148
	Note: *Enter on line a above parking fees, tolls, etc., not entered on the Vehicle Worksheet. Don't include commuting expenses.*	
b.	Business tolls, parking from Vehicle Wksht	0
c.	Total. To line 2	1,148

		Column A	Column B
2. Parking fees, tolls, local trains, buses, etc	2	1,148	
3. Travel expense while away from home overnight	3		

Note: *Line 3 is for expenses while away from home overnight, e.g., hotel, car rental, airplane.* **Do NOT** *include meals & entertainment on line 3 or 4.*

MINI-WORKSHEET FOR LINE 4, OTHER BUSINESS EXPENSES

a.	Depreciation expenses (e.g., computer)	0
	Note: *Depreciation expenses carry from the Depreciation Worksheet for Form 2106, if line 1 of that worksheet is set for this copy of Form 2106.*	
b.	Education expenses	
	Note: DO NOT INCLUDE *any tuition and fees you deducted on Form 1040, line 27, (Tuition and fees adjustment), any education expenses you deducted on Form 1040, line 23 (Educator expenses adjustment), or any education expenses being used to claim an education credit on Form 8863.*	
c.	Expenses of seeking a job	
d.	Expenses of special clothing	100
e.	Use of home as an employee (use Form 8829)	0
	Note: *The amount that carries from Form 8829 is the difference between line 34 of Form 8829 and line 14 of Form 8829. You should deduct any home mortgage interest and real estate taxes on the appropriate lines on Schedule A. You should deduct any casualty or theft losses directly on Form 4684.*	
f.	Other (dues, publications, bus. gifts, etc.)	6,000
g.	Total. To line 4	6,100

		Column A	Column B
4. Business expenses not included on lines 1 to 3	4	6,100	
5. Meal & entertainment expenses. See IRS instrucs	5		
6. **Total expenses** In Column A, add lines 1 through 4. In Column B, enter the amount from line 5.	6	7,248	

Note: *If you were not reimbursed for any expenses in Step 1, skip line 7 and enter the amount from line 6 on line 8.*

Step 2 Enter Reimbursements Received from Your Employer for Expenses Listed in Step 1

MINI-WORKSHEET FOR LINE 7, REIMBURSEMENTS NOT INCLUDED ON FORM W-2, BOX 1

a. Qualified reimbursements for rural mail carriers

Note: *On line b., manually include amounts reported as code "L" in Box 12 on Form W-2.*

b. Other reimbursements not reported on

Form W-2, box 1

i. Other than meals and entertainment . . . .

ii. Meals and entertainment . . . .

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7. Reimbursements **NOT** reported on Form W-2 Box 1.	**7**	0	
Step 3 Figure Expenses to Deduct on Schedule A (Form 1040)			
8a. Line 6 - line 7 (column A) . . . . 7,248 **Note:** *If line 7 is greater than line 6 in Column A (i.e., if line 8a is negative), we carry (via the "Worksheet for Wages Not on a W-2") the amount to Form 1040, above line 7, as other wage income.*			
8. Line 6 - line 7 (not < 0). However, if line 7 is greater than line 6 in Column A, report the excess as income on Form 1040, line 7.	**8**	7,248	0
Note: *If* **both columns** *of line 8 are zero, you cannot deduct employee business expenses. Stop here, and attach Form 2106 to your return.* ☐ "X" here if you're an employee subject to the Department of Transportation (DOT) hours of service limits. If you're an employee subject to the DOT hours-of-service limits, enter here the portion of your unreimbursed meal expenses that you incurred during, or incident to, any period of duty for which the DOT hours of service limits are in effect. The amount you enter will be multiplied by 75% (instead of 50%) to figure column B of line 9			
9. Col A: ln 8 amt. Col B: ln 8 x 50%	**9**	7,248	0

Note: *If you checked the DOT box above, we figure column B of line 9 as the following:*

(.50 x excess of line 8, col. B over DOT amount) + (.75 x DOT amount)

10. Line 9, columns A and B. **To Schedule A (1040), line 20** . . . . ▶ **10** 7,248

Note: *Please add a description of this total on Schedule A, line 20.*

☐ "X" if fee-basis state or local government official (total will carry to 1040 line 24).

☐ "X" if qualified performing artist (total will carry to 1040 line 24).

☐ "X" if reservist claiming deduction for expenses incurred overnight more than 100 miles from home (total will carry to 1040 line 24).

☐ "X" if these are impairment-related work expenses (to Sch A ln 27).

KIA

END OF PAGE 1

Jeremy Q Peterson SSN: 414-45-3120

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PART II-VEHICLE EXPENSES

Section A - General Information (You must complete this section if you are claiming vehicle expenses.)	**Vehicle 1**	**Vehicle 2**
11. Date vehicle was placed in service **11**		
12. Total miles vehicle was driven during 2006 . . . . . **12**		
13. Business miles included on line 12 . . . . . **13**		
14. Percent of business use. (Line 13/line 12) **14**		
15. Average daily round trip commuting distance **15**		
16. Commuting miles included on line 12 . . . . . **16**		
17. Other miles (Ln 12 - (Ln 13+Ln 16)) **17**		

18. Do you (or your spouse) have another vehicle available for personal use? . . . . . ☐ **Y** ☐ **N**

19. Was your vehicle available for personal use during off-duty hours? . . . . . ☐ **Y** ☐ **N**

20. Do you have evidence to support your deduction? . . . . . ☐ **Y** ☐ **N**

21. If yes, is the evidence written? . . . . . ☐ **Y** ☐ **N**

Section B - Standard Mileage Rate (See Instructions for Part II.)

Note: *Enter all your car information on the Vehicle Worksheet, whether you use standard mileage or actual expenses.*

Note: *For more information about vehicles, see "Explain This Form" for Form 2106.*

Check to complete lines 22 using the standard mileage method . . . . . ☐

22. Multiply line 13 by 44.5 cents (.445) **22** 0

Section C - Actual Expenses.	**(a) Vehicle 1**		**(b) Vehicle 2**	
23. Gas, oil, repair, insur **23**				
24. a. Vehicle rentals **24a**				
b. Inclusion amount **24b**				
c. Line 24a - 24b **24c**		0		0
25. Value of employer-provided vehicle (if on W-2 at 100% annual lease value) **25**				
26. Lines 23+24c+25 . . . . **26**		0		0
27. Line 26 * % on line 14 . . . . **27**		0		0
28. Deprec from ln 38 below **28**		0		0
29. Lns 27 + 28. To ln 1 . . . . **29**		0		0

Section D - Vehicle Depreciation (a) Vehicle 1 (b) Vehicle 2

Note: *Depreciation can only be claimed for a vehicle you own. Data carries here from the Vehicle Worksheet.*

Note: *Use Section D only if you own the vehicle and are completing Section C for the vehicle.*

	(a) Vehicle 1		**(b) Vehicle 2**	
30. Cost or other basis **30**				
31. 2006 Sec. 179 deduction and special allowance **31**				

Note: *Line 31, Sec 179 and special allowance applies only if car was placed in service in 2006. See IRS instructions.*

	(a) Vehicle 1		**(b) Vehicle 2**	
32. Ln 30 * ln 14 (see inst if claiming Sec 179 deduction or special allowance) **32**				
33. Deprec. method and % **33**				

Note: *For the calculations on line 32 and line 37 of Form 2106, we generally use a percentage that is equal to business miles divided by total miles (i.e., line 13/line 12).*

Note: *The description of method and percentage appearing on line 33 are prescribed by the IRS. The amount on line 34 carries from the Vehicle Worksheet (and might not equal line 32 * line 33).*

	(a) Vehicle 1		**(b) Vehicle 2**	
34. Deprec. amt (ln 32*33) **34**				
35. Lines 31 + 34 . . . . **35**				
36. Luxury car limit **36**				
37. Line 36 * % on line 14 . . . . **37**				

Note: *We enter the amount from line 35 above on line 37 if: (i) the vehicle was put into service this year (or sold this year) and there were some months of personal use of the vehicle, or (ii) the vehicle is not a "passenger automobile."*

38.	Smaller of lns 35 or 37. Carried to ln 28 above **38**				

SUPPORTING FORMS

RE: 2006 Tax Returns

PREPARED FOR: Jeremy Peterson **SSN:** 414-45-3120

PRINTED ON: May 03, 2007

PREPARED USING: TaxCut [8201]

SUPPORTING FORMS WHICH CAN BE SUBMITTED TO THE IRS

SUPPORTING FORMS IN YOUR RETURN

1. - Background Worksheet - Background Information Worksheet
2. - Form 1099-INT/OID - Interest Income Worksheet
3. - Non-W2 Wages - Worksheet for Wages Not on a W-2

****************** DO NOT MAIL THIS PAGE ******************

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1. YOUR NAME, ADDRESS AND TELEPHONE NUMBER

Your name (first, MI, last, Jr/III) . . . . Jeremy Q Peterson
Spouse's name (first,MI,last,Jr/III) . . . .
C/O information, if necessary . . . .
Your street and apartment # (if any) . . . . 2313 Covey Lane
Your city, state, and ZIP code . . . . Chattanooga, TN 37421
Your telephone number (daytime) 423-488-5315
Spouse's telephone number (daytime) . . . .
Your telephone number (home) 423-488-5315

- ☐ The IRS is asking for daytime phone numbers. X here if you do not want us to enter your phone number on Form 1040 or Form 1040A. The IRS says entering the phone number is optional, but some states require it.
- ☐ X here if this is a foreign address (not APO/FPO).
- ☐ X here if you live outside the U.S. and Puerto Rico and your main place of work is outside the U.S. and Puerto Rico, or if you're in military or naval service outside the U.S. and Puerto Rico.
- ☐ X here if you had a hurricane retirement distribution in 2005 or 2006.
- ☐ X here if you housed a victim of Hurricane Katrina.
- ☐ X here if you, your spouse, or a dependent attended college or post-secondary school in the Gulf Opportunity Zone (GO Zone).

2. GENERAL INFORMATION

		Yours	Your spouse's
a.	Social Security number	414-45-3120	
b.	Date of birth (MM/DD/YYYY)	08/20/1984	
c.	"X" if legally blind	☐	☐
d.	Enter "X" if disabled	☐	☐
e.	Occupation	Automotive Technician	
f.	"X" if you want $3 to go to Pres. Elec. Campaign Fund	☐	☐

~~~~~~

		Primary taxpayer	Spouse
g.	If this return is for a deceased person, enter the date of death		

3. FILING STATUS

a. Choose your filing status below:

- ☒ Single
- ☐ Married filing joint return
- ☐ Married filing separate return
- ☐ Head of household
- ☐ Qualifying widow(er)

If you have not yet made an entry, we choose married filing a joint return. For more information, see the filing status section of the IRS instructions for Form 1040.

b. If you are married filing separately, check the applicable box.
I want to itemize my deductions . . . . ☐
I want to use the standard deduction . . . . ☐

c. Check the box if you are married filing separately **AND** you and your spouse lived apart throughout 2006 . . . . ☐

d. If filing status is head of household, and qualifying person is a child but not your dependent, enter the child's name . . . .
and SSN . . . .
Click here to clear or make a new selection . . . . ☐

Note: *Once you enter information on line d, we will carry that data into a copy of the Dependents Worksheet as a nondependent. To delete or edit this information, you'll need to delete or edit the copy of the Dependents Worksheet that applies to this person. If you determine this person is your dependent after completing the Dependent Worksheet, we'll set the above fields null.*

e. If qualifying widow(er), enter the year your spouse died . . . .

f. Dual-Status Alien: Enter "X" if you or your spouse is a dual-status alien **AND** you are NOT entering on this tax return your combined worldwide income. If you enter "X," your standard deduction is zero . . . . ☐

BACKGROUND INFO CONTINUED ON PAGE 2
~~~~~~

END OF PAGE 1

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Jeremy Q Peterson SSN: 414-45-3120

4. EXEMPTIONS FOR YOU AND YOUR SPOUSE

a. Place an "X" here if anyone else (a parent, e.g.) can claim you as a dependent on his or her tax return. (Joint filers enter "X" only if someone else can claim you, **AND** your tax before withholding is zero.) . . . . ☐

b. Enter "Y" if you are entitled to an exemption for yourself . . . . Y
(This is always "Y," unless the question above is "X.")

c. If married, place an "X" here if anyone else (a parent, e.g.) can claim **your spouse** as an exemption on his or her tax return. (Joint filers enter "X" only if someone else can claim your spouse, **AND** your tax before withholding is zero.) . . . . ☐

d. Enter "X" if you are entitled to an exemption for your spouse . . . . ☐
(Married filing jointly or, in some cases, married filing separately or head of household. See IRS 1040/1040A instructions for details.)

5. TAXES PAID/WITHHELD

a. Estimated taxes paid (do not include 2005 refund applied):

Date	**Amount**

Total estimated tax payments 0

Note: *If you and your spouse each filed separate extensions but are now filing a joint return, or if you jointly filed an extension but are now filing separate returns, see the IRS instructions to Form 4868 and adjust the amount on line b. accordingly.*

b. Amount paid with Form 4868 (for October returns) . . . .

c. Withholding on Form 1099-B . . . .

d. Withholding on Form 1099-PATR . . . .

6. PAYING YOUR TAXES BY CREDIT CARD

a. Confirmation number, if taxes are being paid by credit card.

b. Amount charged to credit card (not including convenience fee), if taxes are being paid by credit card . . . .

7. REFUND INFORMATION

Direct Deposit

Would you like to speed your refund by having the IRS deposit it directly into your account at a bank or other financial institution in the United States? If so, fill in the following regarding the account and place an X here . . . . ☒

a. Routing Transit Number ("RTN") 063000047

b. Depositor Account Number ("DAN") 005499102365

Note: *Here is a sample of the numbers you might find at the bottom of a check, with "RTN," "DAN," and check number identified.*

RTN:	DAN:	Check number:
123404567	**123-4567**	**0101**

c. Type of account:
☒ Checking ☐ Savings

Applying Refund to Your 2007 Estimated Tax

If you are due a refund this year, do you want to apply any of it to 2007 estimated tax? If so, please enter the amount here

BACKGROUND INFO CONTINUED ON PAGE 3

END OF PAGE 2

Jeremy Q Peterson SSN: 414-45-3120

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8. THIRD PARTY DESIGNEE

Do you want to allow another person to discuss this return with the IRS? ☐ **Yes** ☒ **No**

If **Yes,** *complete the following information:*

Designee's name:

Designee's phone number:

Designee's personal identification number (PIN):

9. RETURN ASSISTANCE

How was this return prepared:

☒ By yourself.

☐ With help of an IRS-sponsored program (if so, enter one of the following: TC, TCE, TC-X, TCE-X, VITA, VITA-T, Self-Help, IRS-Prepared, IRS-Reviewed, Outreach): .

10. STATE TAX RETURNS

Enter information below about any 2006 state tax returns you're filing. For each state, select the residency status that applies for 2006.

Name of state(s)	Residency status
TN	Full-year resident

Not For Filing

Use this form to report interest you received, even if it wasn't reported on a Form 1099-INT/1099-OID.

Is this interest for:

☒ You ☐ Your spouse ☐ Both of you

What kind of interest is this:

☒ Interest reported on Form 1099-INT (fill in 1099-INT below) (go to "Exempt Interest" below)

☐ Original issue discount/interest reported on Form 1099-OID (fill in 1099-OID below)

☐ Seller-financed mortgage interest (go to "Seller-Financed Mortgage Interest" below)

☐ Other interest (fill in 1099-INT below)

If you need to make any adjustments, also complete the "Adjustments" section at the bottom of this form.

Interest paid by: Bank of America

FORM 1099-INT

Box 1 - Interest income: $ 85.26

Box 2 - Early withdrawal penalty: $

Box 3 - Interest on U.S. Savings Bonds and Treasury obligations: $

Box 3 includes Series EE or I Savings Bond interest . . . . ☐

Box 4 - Federal income tax withheld: $

Box 5 - Investment expenses: $

Note: *if you did not receive a Form 1099-INT, don't use boxes 6 and 7 below. Instead, report your foreign taxes on Form 1116.*

Box 6 - Foreign tax paid: $

Box 7 - Foreign country or U.S. possession:

Box 8 - Tax-exempt interest: $

MINI-WORKSHEET FOR LINE 8

Answer the following question if you're a full-year resident and you'll be using a state edition of our program to prepare your state tax return.

a. Portion of box 8 exempt from STATE tax $

Box 9 - Specified private activity bond interest: $

FORM 1099-OID

Box 1 - Original issue discount for 2006: $

Box 2 - Other periodic interest: $

MINI-WORKSHEET FOR LINE 2

Answer the following question if you'll be using a state edition of our program to prepare your state tax return.

a. Portion of box 2 from U.S. Treasury obligations $

Box 3 - Early withdrawal penalty: $

Box 4 - Federal income tax withheld: $

Box 6 - Original issue discount on U.S. Treasury obligations: $

Box 7 - Investment expenses: $

SELLER-FINANCED MORTGAGE INTEREST

If this interest is from a seller-financed mortgage and the buyer used the property as a personal residence, enter the following information:

Buyer's name . . . .

Buyer's Social Security number . . . .

Buyer's address . . . .

Interest received in 2006 . . . .

Note: *Be sure to give your Social Security number to the buyer, or you may be subject to a $50 penalty.*

ADJUSTMENTS

Enter below the type and amount of any adjustments that you may need to make to this interest item:

Type of adjustment:

- ☐ Nominee interest
- ☐ OID adjustment
- ☐ Accrued interest adjustment required
- ☐ Amortizable bond premium
- ☐ U.S. Savings Bond adjustment (not the same as Form 8815 adj.)
- ☐ Other adjustment (frozen deposit, etc.)

Amount of adjustment:

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Jeremy Q Peterson SSN: 414-45-3120

		You	Spouse
1	Wages received as a household employee		
2	Unreported tip income and allocated tips (Form 4137)		
3	Taxable dependent care benefits (Form 2441 or Sch 2)	0	0
4	Taxable employer-provided adoption benefits	0	0
5	Taxable scholarship and fellowship grants		

MINI-WORKSHEET FOR EXCESS SALARY DEFERRALS

		You	Spouse
a.	Total deferred compensation from W-2's		
b.	Tentative limitation amount		
c.	Actual limitation amount (if different from line b above)		
d.	Excess salary deferrals (line a minus line b; but if line c > 0, then line a minus line c).		
e.	Excess salary deferrals reported on 1099-R		
	Note: *Make an entry on line e if a plan distribution was reported on Form 1099-R with code 8 in box 7, and the distribution included excess salary deferrals (other than Roth 401(k)/403(b) deferrals).*		
f.	Net excess salary deferrals (ln d - ln e)		
g.	Roth 401(k)/403(b) contributions		
h.	Excess Roth 401(k)/403(b) contributions (line g minus line b; but if line c > 0, line g minus line c)		
i.	Line f minus line h (not <0). To line 6		

		You	Spouse
6	Excess salary deferrals		
7	Pre-retirement disability pensions (Form 1099-R)	0	0
8	Corrective retirement plan distrib (Form 1099-R)	0	0
9	Compensation reported on a 1099-MISC	0	0
10	Excess reimbursements of employee business expenses	0	0
11	Excess reimbursements of moving expenses	0	0
12	Foreign earned income (Form 2555-EZ)	0	0
13	Other wage-type income		
14	Total	0	0