

H&R Block ADVANTAGE



H&R BLOCK®

Prepared For:

04/17/2006

Prepared By:

For Year-round Service:

Today's Savings

Filing, Refund and Balance Due Information

Tax Return	efile	Refund / (Balance Due)	Payment Information	Delivery
Federal	No	\$715.00	Refund	\$715.00
See the Filing Checklist for instructions.				

- **Build savings a little at a time:**

You don't need to build a big nest egg all at once. Most banks and financial institutions offer automatic savings programs, and many employers offer automatic payroll deductions to fund a savings account. Such programs are an easy way to get started because they let you automatically save as little as \$25 a month.

- **A dependent doesn't have to be a child or relative:**

You can claim anyone who lives in your home, has less than \$3,200 in income from taxable sources, and receives at least 50% of his or her support from you. If a dependent is related to you (by blood, marriage or adoption), he or she doesn't even have to live with you.

- **Life changes impact your taxes:**

Getting married or divorced, getting a promotion, having a baby, buying a home or becoming self-employed are just a few life events that can affect your taxes. If your life situation changes - or if you would like to manage the size of your refund next year - fill out a new Form W-4 to give to your employer.

- **Check on inheritance taxes:**

If you inherit money or property from someone's estate, your inheritance is generally free of taxes. However, you may be taxed on funds you inherit from a traditional IRA or a 401(k). If you inherit a home and sell it, only the difference between the value when you inherited it and when you sold it is taxable. Any gain before you inherited it is not taxed. You may need to talk with a financial or tax advisor to find out which part of your inheritance, if any, is subject to federal or state taxes.

For more information about tax, mortgage and financial services call 1-800-HRBLOCK or visit hrblock.com.

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2005 Tax Return Summary

Federal Year over Year Comparison

INCOME	Year 2005	Year 2004	Change(\$)
Wages, salaries, tips	\$27,241	\$0	\$27,241
Total income	\$27,241	\$0	\$27,241
ADJUSTED GROSS INCOME			
Total income less total adjustments	\$27,241	\$0	\$27,241
TAXABLE INCOME			
Standard deductions	\$5,000	\$0	\$5,000
Exemptions	\$3,200	\$0	\$3,200
Taxable income	\$19,041	\$0	\$19,041
TAX COMPUTATION			
Income tax	\$2,489	\$0	\$2,489
Tax before credits	\$2,489	\$0	\$2,489
OTHER TAXES			
Total tax	\$2,489	\$0	\$2,489
PAYMENTS			
Federal withholding	\$3,204	\$0	\$3,204
Total payments	\$3,204	\$0	\$3,204
REFUND			
Overpayment	\$715	\$0	\$715
Refund due	\$715	\$0	\$715
OTHER COMPUTATIONS			
Alternative minimum taxable income	\$27,241	\$0	\$27,241
Marginal tax bracket	15%		
Effective tax bracket	9%		
Filing status	Single		

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This checklist has been customized for you based on the method you're using to file your 2005 tax return. The statements below are designed to help guide you through the steps you will take to file your return.

filing checklist for your 2005 federal tax return

Prepared On: 04/17/2006

Return Prepared: 1040EZ

quick summary

Gross Income	\$ 27,241	Total Tax	\$ 2,489
Adjusted Gross Income	\$ 27,241	Total Payments	\$ 3,204
Total Deductions	\$ 8,200	Refund Amount	\$ 715
Total Taxable Income	\$ 19,041	Amount You Owe	\$ 0

to file your 2005 federal tax return, simply follow these instructions

STEP 1 - Sign and date Form 1040EZ

STEP 2 - Assemble what you need to mail

Attach any schedules and forms behind Form 1040EZ in order of the Attachment Sequence Number shown in the upper right corner of the schedule or form. If there are supporting statements, arrange them in the same order as the schedules or forms they support and attach them last. Do not attach correspondence or other items unless required to do so. Attach a copy of each W-2, W-2G, and 2439 to the front of Form 1040EZ. Also attach Form(s) 1099-R or 1099-G if tax was withheld.

STEP 3 - Mail Form(s)

Mail Form 1040EZ and associated documents to this address:
Internal Revenue Service Center
Austin, TX 73301-0002

Retain the proof of mailing to avoid a late filing penalty.
We recommend you use one of these methods to send your 1040EZ:

- U.S. Postal Service certified mail.
- If you are not mailing to an address with a post office box, you may also use:
- DHL Express (DHL): Same Day Service, Next Day, or 2nd Day Service
 - Federal Express (FedEx): Priority Overnight, Standard Overnight, 2Day, International Priority, or International First
 - United Parcel Service (UPS): Next Day Air, Next Day Air Saver, 2nd Day Air, or Worldwide Express

STEP 4 - Keep a copy

Print a copy of the return for your records.
Please attach a copy of each W-2, W-2G, 1099G and 1099R to your return.

Label
(See page 11.)
**Use the IRS
label.**
Otherwise,
please print
or type.

JEREMY Q PETERSON
2313 COVEY LANE
CHATTANOOGA, TN 37421

Your social security number
414-45-3120
Spouse's social security no.

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

Checking a box below will not
change your tax or refund.

**Presidential
Election
Campaign**
(page 12) ▶

Check here if you, or your spouse if a joint return, want \$3 to go to this fund? ▶ ☐ **You** ☐ **Spouse**

Income
Attach
Form(s) W-2
here.

Enclose, but
do not attach,
any payment.

1	Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2.	1	27,241.
2	Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.	2	
3	Unemployment compensation and Alaska Permanent Fund dividends (see page 13).	3	
4	Add lines 1, 2, and 3. This is your adjusted gross income .	4	27,241.
5	If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the separate worksheet. <input type="checkbox"/> You <input type="checkbox"/> Spouse If someone cannot claim you (or your spouse if a joint return), enter \$8,200 if single ; \$16,400 if married filing jointly . See page 2 for explanation.	5	8,200.
6	Subtract line 5 from line 4. If line 5 is larger than line 4, enter - 0- . This is your taxable income .	6	19,041.

**Payments
and tax**

7	Federal income tax withheld from box 2 of your Form(s) W-2.	7	3,204.
8a	Earned income credit (EIC).	8a	
b	Nontaxable combat pay election 8b		
9	Add lines 7 and 8a. These are your total payments .	9	3,204.
10	Tax. Use the amount on line 6 above to find your tax in the tax table on pages 24- 32 of the booklet. Then, enter the tax from the table on this line.	10	2,489.

Refund

Have it directly
deposited! See
page 18 and fill
in 11b, 11c,
and 11d.

11a	If line 9 is larger than line 10, subtract line 10 from line 9. This is your refund .	11a	715.
▶ b	Routing number 063000047	▶ c	Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings
▶ d	Account number 005499102365		

**Amount
you owe**

12	If line 10 is larger than line 9, subtract line 9 from line 10. This is the amount you owe . For details on how to pay, see page 19.	12	
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**Third party
designee**

Do you want to allow another person to discuss this return with the IRS (see page 19)? ☐ **Yes.** Complete the following. ☒ **No**
Designee's name _____ Phone no. _____ Personal ID number
(PIN) ▶ _____

**Sign
here**

Joint return?
See page 11. ▶

Keep a copy
for your
records.

Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and
accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is
based on all information of which the preparer has any knowledge.

Your signature	Date	Your occupation AUTOMOTIVE TECH	Daytime phone number
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 <input type="checkbox"/>	Preparer's SSN or PTIN
Firm's name (or yours if self-employed), address, and ZIP code ▶	EIN	Phone no.	