H&R Block
ADVANTAGE®

H&R BLOCK

Prepared For:
STEPHEN E. ROOS

02/04/2019

Today's Savings

* By participating in a qualified retirement plan through your employer this year and making your contributions with pretax dollars, you reduced your taxes by: $504.00

* In simple terms, the Marginal Tax Rate is the tax rate that you pay on your last dollar of taxable income. It is the highest federal tax bracket that affects your tax calculation. The Effective Tax Rate is the percentage of your total income that you paid in taxes. For 2018, your Marginal Tax Rate is 24% and your Effective Tax Rate is 17%.

Total Savings. $504.00

Filing, Refund and Balance Due Information

Tax Return	efile	Refund / (Balance Due)	Summary		Message
Federal	No	$2,349.00	Refund	$2,349.00	See the Filing Checklist for instructions.

This H&R Block Advantage document provides information that could help you improve your tax and financial situation. Its contents should be considered in conjunction with information you receive from other sources that are familiar with your specific circumstances. Tax services offered through subsidiaries of HRB Tax Group, Inc.

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2018 Tax Return Summary

Federal Year over Year Comparison

INCOME	Year 2018	Year 2017	Change($)
Wages, salaries, tips	$132,060	$115,521	$16,539
Business income (loss)	$0	$600	($600)
Total income	$132,060	$116,121	$15,939
ADJUSTMENTS			
Self-employed tax deduction	$0	$43	($43)
Total adjustments	$0	$43	($43)
ADJUSTED GROSS INCOME			
Total income less total adjustments	$132,060	$116,078	$15,982
TAXABLE INCOME			
Standard deductions	$12,000	$6,350	$5,650
Exemptions	$0	$4,050	($4,050)
Taxable income	$120,060	$105,678	$14,382
TAX COMPUTATION			
Income tax	$23,104	$22,572	$532
Tax before credits	$23,104	$22,572	$532
OTHER TAXES			
Self-employment tax	$0	$85	($85)
Total tax	$23,104	$22,657	$447
PAYMENTS			
Federal withholding	$25,453	$22,900	$2,553
Total payments	$25,453	$22,900	$2,553
REFUND			
Overpayment	$2,349	$243	$2,106
Refund due	$2,349	$243	$2,106
OTHER COMPUTATIONS			
Alternative minimum taxable income	$132,060	$116,078	$15,982
Marginal tax bracket	24%	28%	
Effective tax bracket	17%		
Filing status	Single	Single	

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STEPHEN E ROOS

Tax Return Signature/Consent to Disclosure
On-Line Self Select PIN without Direct Debit

Perjury Statement

Under penalties for perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to IRS and to receive the following information from IRS: a) an acknowledgement of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay in processing or refund; and, d) the date of any refund.

I am signing this Tax Return and Electronic Funds Withdrawal Consent, if applicable, by entering my Self Select PIN below.

Taxpayer's PIN:		Date:	
Taxpayer's Date of Birth:	10/25/1990		
Taxpayer's Prior Year Adjusted Gross Income:	0.		
Taxpayer's Prior year PIN			
Taxpayer's Electronic Filing PIN			
Spouse's PIN:			
Spouse's Date of Birth:			
Spouse's Prior Year Adjusted Gross Income:			
Spouse's Prior year PIN			
Spouse's Electronic Filing PIN			

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2018 Federal Tax Return Filing Instructions

FOR THE YEAR ENDING

December 31, 2018

Prepared for	STEPHEN E ROOS
Tax Summary	Gross Income .... $ 132,060 Adjusted Gross Income .... $ 132,060 Total Deductions .... $ 12,000 Total Taxable Income .... $ 120,060 Total Tax .... $ 23,104 Total Payments .... $ 25,453 Refund Amount .... $ 2,349 Amount You Owe .... $ 0
Make check payable to	United States Treasury
Mailing Address	Department of the Treasury Internal Revenue Service Austin, TX 73301-0002

Instructions

STEP 1 - Sign and date Form 1040

STEP 2 - Assemble what you need to mail

Attach any schedules and forms behind Form 1040 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 1040. Also attach Form(s) 1099-R or 1099-G if tax was withheld.

STEP 3 - Mail Form(s)

Mail Form 1040 and associated documents to the address above.
Retain the proof of mailing to avoid a late filing penalty.
We recommend you use one of these methods to send your 1040:
- U.S. Postal Service certified mail.

If you are not mailing to an address with a post office box, you may also use certain private delivery services (PDS) designated by the IRS to meet the 'timely mailing as timely filing' rule for tax returns. Go to IRS.gov/PDS for current list of designated services. For the IRS mailing addresses to use if you're using PDS, go to IRS.gov/PDSstreetAddresses.

CONTINUED ON NEXT PAGE

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2018 Federal Filing Instructions Continued

Instructions

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.

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FORM **1040** Department of the Treasury - Internal Revenue Service (99)

U.S. Individual Income Tax Return **2018** OMB No. 1545-0074 IRS Use Only - Do not write or staple in this space.

Filing status: [X] Single [ ] Married filing jointly [ ] Married filing separately [ ] Head of household [ ] Qualifying widow(er)

Your first name and initial	Last name	Your social security number
STEPHEN E	ROOS	644-20-6675

Your standard deduction: [ ] Someone can claim you as a dependent [ ] You were born before January 2, 1954 [ ] You are blind

If joint return, spouse's first name and initial	Last name	Spouse's social security no.

Spouse standard deduction: [ ] Someone can claim your spouse as a dependent [ ] Spouse was born before January 2, 1954 [ ] Spouse is blind [ ] Spouse itemizes on a separate return or you were dual- status alien

[X] Full- year health care coverage or exempt (see inst.)

Home address (number and street). If you have a P.O. box, see instructions.	Apt. no.	Presidential Election Campaign (see inst.) [ ] You [ ] Spouse
6550 SHADYBROOK LN	714	

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6.

DALLAS, TX 75206

If more than four dependents, see inst. and ✓ here ▶ [ ]

COPY

Dependents (see instructions): (1) First name	Last name	(2) Social security no.	(3) Relationship to you	(4) ✓ if qualifies for (see inst.): Child tax credit	Credit for other dependents

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.

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

Your signature	Date	Your occupation	If the IRS sent you an ID Protection PIN, enter it here (see inst.)
		SOFTWARE ENGINEE	
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent you an ID Protection PIN, enter it here (see inst.)

ONLY

Paid Preparers Use Only

Preparer's name	Preparer's signature	PTIN	Firm's EIN	Check if:
				[ ] 3rd Party Designee
Firm's name ▶		Phone no.		[ ] self- employed
Firm's address ▶				

KBA For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Form **1040** (2018)

DO NOT

FILE

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

Standard Deduction for -

- Single or married filing separately, $12,000
- Married filing jointly or Qualifying widow(er), $24,000
- Head of household, $18,000
- If you checked any box under Standard deduction, see instructions.

1	Wages, salaries, tips, etc. Attach Form(s) W-2		1	132,060.
2a	Tax-exempt interest	2a		
	b Taxable interest		2b	
3a	Qualified dividends	3a		
	b Ordinary dividends		3b	
4a	IRAs, pensions, and annuities	4a		
	b Taxable amount		4b	
5a	Social security benefits	5a		
	b Taxable amount		5b	
6	Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22		6	132,060.
7	Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 36, from line 6		7	132,060.
8	**Standard deduction or itemized deductions** (from Schedule A)		8	12,000.
9	Qualified business income deduction (see instructions)		9	
10	Taxable income. Subtract lines 8 and 9 from line7. If zero or less, enter -0-		10	120,060.
11	**a** Tax (see inst) 23,104. (check if any from: 1 ☐ Form(s) 8814 2 ☐ Form 4972 3 ☐)			
	b Add any amount from Schedule 2 and check here ▶ ☐		11	23,104.
12	**a** Child tax credit/credit for other dependents **b** Add any amount from Schedule 3 and check here ▶ ☐		12	
13	Subtract line 12 from line 11. If zero or less, enter -0-		13	23,104.
14	Other taxes. Attach Schedule 4		14	
15	Total tax. Add lines 13 and 14		15	23,104.
16	Federal income tax withheld from Forms W-2 and 1099		16	25,453.
17	Refundable credits: **a** EIC (see inst.) **b** Sch 8812 **c** Form 8863 **Add** any amount from Schedule 5		17	
18	Add lines 16 and 17. These are your total payments		18	25,453.

Refund

19	If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you **overpaid**		19	2,349.
20a	Amount of line 19 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐		20a	2,349.
▶ b	Routing number XXXXXXXXXXXXXXXXX ▶ **c** Type: ☐ Checking XXXXX ☐ Savings XXXX			
▶ d	Account number XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
21	Amount of line 19 you want **applied to your 2019 estimated tax** ▶	21		

Direct deposit? See instructions.

Amount You Owe

22	**Amount you owe.** Subtract line 18 from line 15. For details on how to pay, see instructions ▶		22	
23	Estimated tax penalty (see instructions) ▶	23		

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DO NOT FILE