Electronic Filing Instructions for your 2013 Federal Tax Return

Important: Your taxes are not finished until all required steps are completed.

Kevin S & Dana Kopp
1337 S Hillside Drive
Saratoga Springs, UT 84045

Balance Due/ Refund	Your federal tax return (Form 1040) shows a refund due to you in the amount of $1,822.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 7710521641189 Routing Transit Number: 101205681.
When Will You Get Your Refund?	The IRS issued more than 9 out of 10 refunds to taxpayers in less than 21 days last year. The same results are expected in 2014. To get your estimated refund date from TurboTax, log into My TurboTax at www.turbotax.com. If you do not receive your refund within 21 days, or the amount you get is not what you expected, contact the Internal Revenue Service directly at 1-800-829-4477. You can also check www.irs.gov and select the "Where's my refund?" link.
What You Need to Keep	Your Electronic Filing Instructions (this form) Printed copy of your federal return

2013 Federal Tax Return Summary		
	Adjusted Gross Income	$ 107,836.00
	Taxable Income	$ 72,862.00
	Total Tax	$ 8,536.00
	Total Payments/Credits	$ 10,358.00
	Amount to be Refunded	$ 1,822.00
	Effective Tax Rate	6.56%

Hi Kevin and Dana,

We just want to thank you for using TurboTax this year! It's our goal to make your taxes easy and accurate, year after year.

With TurboTax Deluxe:
Your Head Start On Next Year:
When you come back next year, taxes will be so easy! We'll have all your information saved and ready to transfer in to your new return. We'll ask you questions about what changed since we last talked, and we'll be ready to get you the credits and deductions you deserve, no matter what life throws at you.

Here's the final wrap up for your 2013 taxes:

Your federal refund is: $ 1,822.00

We reviewed over 350 deductions and credits so you can be sure you didn't miss a thing and that you got the maximum refund - guaranteed.
Your Deductions and Credits:

Your itemized deductions for this year: $15,474.00

You qualified for these important credits:
- Child Tax Credit

Your Guarantee of Accuracy:
Breathe easy. The calculations on your return are backed with our 100% Accuracy Guarantee.
- We double checked your return for errors along the way.
- We helped with step-by-step guidance to get your answers on the right IRS forms.
- We made sure you didn't miss a deduction even if something in your life changed, like a new job, new house - or more kids!

Also included:
- We e-filed your federal returns for free, so you could get your refund the fastest way possible.
- We provide the Audit Support Center free of charge, in the unlikely event you get audited.

Many happy returns from TurboTax.

Form **1040** Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return 2013
OMB No. 1545-0074 | IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2013, or other tax year beginning , 2013, ending , 20 | See separate instructions.

Your first name and initial: Kevin S	Last name: Kopp	Your social security number: 520-78-3614
If a joint return, spouse's first name and initial: Dana	Last name: Kopp	Spouse's social security number: 528-47-0103
Home address (number and street). If you have a P.O. box, see instructions.: 1337 S Hillside Drive	Apt. no.	▲ Make sure the SSN(s) above and on line 6c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).: Saratoga Springs UT 84045		**Presidential Election Campaign** Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse
Foreign country name	Foreign province/state/county	Foreign postal code

Filing Status

Check only one box.

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

Exemptions

6a ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☒ **Spouse**

Boxes checked on 6a and 6b: 2

c **Dependents:**

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if child under age 17 qualifying for child tax credit (see instructions)
Ellie E	Kopp	646-76-2516	Daughter	☒
Kassidy	Kopp	647-80-9889	Daughter	☒
Samuel J	MacCauley	647-38-2950	Son	☒
				☐

If more than four dependents, see instructions and check here ▶ ☐

No. of children on 6c who:
• lived with you: 3
• 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 ▶ 5

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.

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	93,235.
8a	**Taxable** interest. Attach Schedule B if required	8a	
b	**Tax-exempt** interest. **Do not** include on line 8a	8b	
9a	Ordinary dividends. Attach Schedule B if required	9a	
b	Qualified dividends	9b	
10	Taxable refunds, credits, or offsets of state and local income taxes	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐	13	
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions 15a — b Taxable amount	15b	
16a	Pensions and annuities 16a — b Taxable amount	16b	14,601.
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits 20a — b Taxable amount	20b	
21	Other income. List type and amount	21	
22	Combine the amounts in the far right column for lines 7 through 21. This is your **total income** ▶	22	107,836.

Adjusted Gross Income

23	Educator expenses	23	
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	Health savings account deduction. Attach Form 8889	25	
26	Moving expenses. Attach Form 3903	26	
27	Deductible part of self-employment tax. Attach Schedule SE	27	
28	Self-employed SEP, SIMPLE, and qualified plans	28	
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶	31a	
32	IRA deduction	32	
33	Student loan interest deduction	33	
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	
37	Subtract line 36 from line 22. This is your **adjusted gross income** ▶	37	107,836.

Tax and Credits

38	Amount from line 37 (adjusted gross income)	38	107,836.
39a	Check if: ☐ **You** were born before January 2, 1949, ☐ Blind. ☐ **Spouse** was born before January 2, 1949, ☐ Blind. **Total boxes checked ▶ 39a**		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here ▶ 39b ☐		
40	**Itemized deductions** (from Schedule A) **or** your **standard deduction** (see left margin)	40	15,474.
41	Subtract line 40 from line 38	41	92,362.
42	**Exemptions.** If line 38 is $150,000 or less, multiply $3,900 by the number on line 6d. Otherwise, see instructions	42	19,500.
43	**Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	72,862.
44	**Tax** (see instructions). Check if any from: **a** ☐ Form(s) 8814 **b** ☐ Form 4972 **c** ☐	44	10,076.
45	**Alternative minimum tax** (see instructions). Attach Form 6251	45	
46	Add lines 44 and 45 ▶	46	10,076.
47	Foreign tax credit. Attach Form 1116 if required	47	
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit. Attach Schedule 8812, if required	51	3,000.
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: **a** ☐ 3800 **b** ☐ 8801 **c** ☐	53	
54	Add lines 47 through 53. These are your **total credits**	54	3,000.
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0- ▶	55	7,076.

Standard Deduction for—
- People who check any box on line 39a or 39b **or** who can be claimed as a dependent, see instructions.
- All others:

Single or Married filing separately, $6,100

Married filing jointly or Qualifying widow(er), $12,200

Head of household, $8,950

Other Taxes

56	Self-employment tax. Attach Schedule SE	56	
57	Unreported social security and Medicare tax from Form: **a** ☐ 4137 **b** ☐ 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required No	58	1,460.
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	0.
60	Taxes from: **a** ☐ Form 8959 **b** ☐ Form 8960 **c** ☐ Instructions; enter code(s)	60	
61	Add lines 55 through 60. This is your **total tax** ▶	61	8,536.

Payments

62	Federal income tax withheld from Forms W-2 and 1099	62	10,358.
63	2013 estimated tax payments and amount applied from 2012 return	63	
64a	**Earned income credit (EIC)**	64a	
b	Nontaxable combat pay election 64b		
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: **a** ☐ 2439 **b** ☐ Reserved **c** ☐ 8885 **d** ☐	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your **total payments** ▶	72	10,358.

If you have a qualifying child, attach Schedule EIC.

Refund

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you **overpaid**	73	1,822.
74a	Amount of line 73 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐	74a	1,822.
b	Routing number 1 0 1 2 0 5 6 8 1 ▶ **c** Type: ☒ Checking ☐ Savings		
d	Account number 7 7 1 0 5 2 1 6 4 1 1 8 9		
75	Amount of line 73 you want **applied to your 2014 estimated tax** ▶	75	

Direct deposit? See instructions.

Amount You Owe

76	**Amount you owe.** Subtract line 72 from line 61. For details on how to pay, see 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 below. ☒ **No**

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

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	Daytime phone number
		Stockbroker	(801)636-4074
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		Housekeeping	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶ Self-Prepared		Firm's EIN ▶		
Firm's address ▶		Phone no.		

SCHEDULE A (Form 1040)

Department of the Treasury Internal Revenue Service (99)

Itemized Deductions

▶ Information about Schedule A and its separate instructions is at *www.irs.gov/schedulea*.
▶ Attach to Form 1040.

OMB No. 1545-0074

2013

Attachment Sequence No. 07

Name(s) shown on Form 1040	Your social security number
Kevin S & Dana Kopp	520-78-3614

Medical and Dental Expenses		**Caution.** Do not include expenses reimbursed or paid by others.				
	1	Medical and dental expenses (see instructions)	1			
	2	Enter amount from Form 1040, line 38 [2]				
	3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1949, multiply line 2 by 7.5% (.075) instead	3			
	4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	
Taxes You Paid	5	State and local **(check only one box):**				
		a ☒ Income taxes, **or** b ☐ General sales taxes	5	4,965.		
	6	Real estate taxes (see instructions)	6	2,326.		
	7	Personal property taxes	7			
	8	Other taxes. List type and amount ▶	8			
	9	Add lines 5 through 8			9	7,291.
Interest You Paid	10	Home mortgage interest and points reported to you on Form 1098	10	6,133.		
Note. Your mortgage interest deduction may be limited (see instructions).	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			
	12	Points not reported to you on Form 1098. See instructions for special rules	12			
	13	Mortgage insurance premiums (see instructions)	13			
	14	Investment interest. Attach Form 4952 if required. (See instructions.)	14			
	15	Add lines 10 through 14			15	6,133.
Gifts to Charity	16	Gifts by cash or check. If you made any gift of $250 or more, see instructions	16	1,654.		
If you made a gift and got a benefit for it, see instructions.	17	Other than by cash or check. If any gift of $250 or more, see instructions. You **must** attach Form 8283 if over $500	17	396.		
	18	Carryover from prior year	18			
	19	Add lines 16 through 18			19	2,050.
Casualty and Theft Losses	20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)			20	
Job Expenses and Certain Miscellaneous Deductions	21	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ▶	21			
	22	Tax preparation fees	22			
	23	Other expenses—investment, safe deposit box, etc. List type and amount ▶	23			
	24	Add lines 21 through 23	24			
	25	Enter amount from Form 1040, line 38 [25]				
	26	Multiply line 25 by 2% (.02)	26			
	27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-			27	
Other Miscellaneous Deductions	28	Other—from list in instructions. List type and amount ▶			28	
Total Itemized Deductions	29	Is Form 1040, line 38, over $150,000?				
		☒ **No.** Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40.			29	15,474.
		☐ **Yes.** Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.				
	30	If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ ☐				

Tax History Report 2013

► Keep for your records

Name(s) Shown on Return

Kevin S & Dana Kopp

	Five Year Tax History:				
	2009	2010	2011	2012	2013
Filing status	MFJ	MFJ	MFJ	MFJ	MFJ
Total income	92,141.	99,527.	115,222.	118,543.	107,836.
Adjustments to income					
Adjusted gross income	92,141.	99,527.	115,222.	118,543.	107,836.
Tax expense	4,055.	5,410.	7,468.	8,184.	7,291.
Interest expense	9,945.	3,703.	8,795.	5,003.	6,133.
Contributions	1,055.	3,817.	1,120.	1,263.	2,050.
Miscellaneous deductions					
Other itemized deductions					
Total itemized/standard deduction	15,055.	12,930.	17,383.	14,450.	15,474.
Exemption amount	21,900.	29,200.	18,500.	19,000.	19,500.
Taxable income	55,186.	57,397.	79,339.	85,093.	72,862.
Tax	7,441.	7,769.	12,081.	13,329.	10,076.
Alternative minimum tax					
Total credits	4,000.	4,000.	1,700.	1,550.	3,000.
Other taxes	293.	1,308.	1,231.	1,410.	1,460.
Payments	3,603.	4,483.	6,266.	13,501.	10,358.
Form 2210 penalty					
Amount owed	131.	594.	5,346.		
Applied to next year's estimated tax					
Refund				312.	1,822.
Effective tax rate %	2.87	2.98	9.01	9.94	6.56
**Tax bracket %	15.0	15.0	25.0	25.0	25.0

**Tax bracket % is based on Taxable income.

Tax Payments Worksheet 2013

► Keep for your records

Name(s) Shown on Return	Social Security Number
Kevin S & Dana Kopp	520-78-3614

Estimated Tax Payments for 2013 (If more than 4 payments for any state or locality, see Tax Help)

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1	04/15/13		04/15/13			04/15/13		
2	06/17/13		06/17/13			06/17/13		
3	09/16/13		09/16/13			09/16/13		
4	01/15/14		01/15/14			01/15/14		
5								
Tot Estimated Payments . . .								

Tax Payments Other Than Withholding (If multiple states, see Tax Help)	Federal	State	ID	Local	ID
6 Overpayments applied to 2013					
7 Credited by estates and trusts					
8 **Totals** Lines 1 through 7					
9 2013 extensions					

Taxes Withheld From:			Federal	State	Local
10 Forms W-2			9,371.	3,316.	
11 Forms W-2G					
12 Forms 1099-R			987.		
13 Forms 1099-MISC and 1099-G					
14 Schedules K-1					
15 Forms 1099-INT, DIV and OID					
16 Social Security and Railroad Benefits					
17 Form 1099-B	St	Loc			
18 a Other withholding	St	Loc			
b Other withholding	St	Loc			
c Other withholding	St	Loc			
d Positive Adjustment . . .	St	Loc			
e Negative Adjustment . .	St	Loc			
f Additional Medicare Tax					
19 **Total Withholding** Lines 10 through 18f			10,358.	3,316.	
20 **Total Tax Payments for 2013**			10,358.	3,316.	

Prior Year Taxes Paid In 2013 (If multiple states or localities, see Tax Help)	State	ID	Local	ID
21 Tax paid with 2012 extensions	1,098.	UT		
22 2012 estimated tax paid after 12/31/2012				
23 Balance due paid with 2012 return	551.	UT		
24 Other (amended returns, installment payments, etc) . .				

Schedule A
Line 5

State and Local Tax Deduction Worksheet

► Keep for your records

2013

Name(s) Shown on Return	Social Security Number
Kevin S & Dana Kopp	520-78-3614

State and Local Income Taxes

	State income taxes:		
1	State income tax withheld	**1**	3,316.
2	2013 state estimated taxes paid in 2013	**2**	
3	2012 state estimated taxes paid in 2013	**3**	
4	Amount paid with 2012 state application for extension	**4**	1,098.
5	Amount paid with 2012 state income tax return	**5**	551.
6	Overpayment on 2012 state income tax return applied to 2013 tax	**6**	
7	Other amounts paid in 2013 (amended returns, installment payments, etc.)	**7**	
8	State estimated tax from Schedule(s) K-1 (Form 1041)	**8**	
	Local income taxes:		
9	Local income tax withheld	**9**	
10	2013 local estimated taxes paid in 2013	**10**	
11	2012 local estimated taxes paid in 2013	**11**	
12	Amount paid with 2012 local application for extension	**12**	
13	Amount paid with 2012 local income tax return	**13**	
14	Overpayment on 2012 local income tax return applied to 2013 tax	**14**	
15	Other amounts paid in 2013 (amended returns, installment payments, etc.)	**15**	
16	Local estimated tax from Schedule(s) K-1 (Form 1041)	**16**	
	Other:		
17		**17**	
18	**Total** Add lines 1 through 17	**18**	4,965.
19	State and local refund allocated to 2013	**19**	
20	Nondeductible state income tax from line 28	**20**	
21	**Total reductions** Add lines 19 and 20.	**21**	
22	**Total state and local income tax deduction** Line 18 less line 21	**22**	4,965.

Nondeductible State Income Tax (Hawaii Only)

23	Nontaxable federal employee cost of living allowance	**23**	
24	Adjusted gross income	**24**	
25	Add lines 23 and 24	**25**	
26	Nondeductible percent. Line 23 divided by line 25	**26**	%
27	Hawaii state income tax included in line 18	**27**	
28	Nondeductible Hawaii state income tax. Multiply line 26 by line 27.	**28**	

Charitable Contributions Summary 2013

► Keep for your records

Name(s) Shown on Return	Social Security Number
Kevin S & Dana Kopp	520-78-3614

Part I Cash Contributions Summary

Name of Charitable Organization	(a) Total	(b) 50% Limit	(c) 30% Limit	(d) RESERVED for future use
Church of Jesus Christ of Latter-D	1,654.	1,654.		
Totals:	1,654.	1,654.		

Part II Non-Cash Contributions Summary

	Total	Other Property		Capital Gain Property	
Name of Charitable Organization	(a) Total	(b) 50% Limit	(c) 30% Limit	(d) 30% Limit	(e) 20% Limit
Deseret Industries	396.	396.			
Totals:	396.	396.			

Part III Contribution Carryovers to 2014

	Total	Cash and Other Non-Capital Gain Property			Capital Gain Property	
	(a) Total	(b) RESERVED	(c) 50% Limit	(d) 30% Limit	(e) 30% Limit	(f) 20% Limit
1 2013 contributions	2,050.		2,050.			
2 2013 contributions allowed	2,050.		2,050.	0.	0.	0.
3 **Carryovers from:**						
a 2012 tax year						
b 2010 tax year						
c 2009 tax year						
d 2008 tax year						
e 2007 tax year						
4 Carryovers allowed in 2013	0.		0.	0.	0.	0.
5 Carryovers disallowed in 2013	0.		0.	0.	0.	0.
6 **Carryovers to 2014:**						
a From 2013	0.		0.	0.	0.	0.
b From 2012						
c From 2010						
d From 2009						
e From 2008						
f From 2007 (expired)						

Part IV Special Situations in Your Return for Current Year Donations

1 Was the **entire interest** given for all property donated to all charities? [X] **Yes** [ ] **No**

2 Were **restrictions** attached to any charities's right to use or dispose of any property donated to any charity? ► [ ] **Yes** [X] **No**

3 Did you give to anyone other than the charity the right to income from any of the donated property or to possession of any of the donated property? ► [ ] **Yes** [X] **No**

4 Was any charity other than a 50% charity? [ ] **Yes** [X] **No**

Federal Carryover Worksheet 2013

► Keep for your records

Name(s) Shown on Return	Social Security Number
Kevin S & Dana Kopp	520-78-3614

2012 State and Local Income Tax Information (See Tax Help)

	(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With-held/Pmts	(e) Paid With Return	(f) Total Over-payment	(g) Applied Amount
	UT	1,098.		5,197.	551.		
Totals . .		1,098.		5,197.	551.		

Other Tax and Income Information		**2012**	**2013**
1 Filing status	**1**	2 MFJ	2 MFJ
2 Number of exemptions for blind or over 65 (0 - 4)	**2**		
3 Itemized deductions	**3**	14,450.	15,474.
4 Check box if required to itemize deductions	**4**	☐	☐
5 Adjusted gross income	**5**	118,543.	107,836.
6 Tax liability for Form 2210 or Form 2210-F	**6**	13,189.	8,536.
7 Alternative minimum tax	**7**		
8 Federal overpayment applied to next year estimated tax	**8**		

QuickZoom to the IRA Information Worksheet for IRA information . . . . ►

Excess Contributions		**2012**	**2013**
9 a Taxpayer's excess Archer MSA contributions as of 12/31	**9 a**		
b Spouse's excess Archer MSA contributions as of 12/31	**b**		
10 a Taxpayer's excess Coverdell ESA contributions as of 12/31	**10 a**		
b Spouse's excess Coverdell ESA contributions as of 12/31	**b**		
11 a Taxpayer's excess HSA contributions as of 12/31	**11 a**		
b Spouse's excess HSA contributions as of 12/31	**b**		

Loss and Expense Carryovers Note: Enter all entries as a positive amount		**2012**	**2013**
12 a Short-term capital loss	**12 a**		
b AMT Short-term capital loss	**b**		
13 a Long-term capital loss	**13 a**		
b AMT Long-term capital loss	**b**		
14 a Net operating loss available to carry forward	**14 a**		
b AMT Net operating loss available to carry forward	**b**		
15 a Investment interest expense disallowed	**15 a**		
b AMT Investment interest expense disallowed	**b**		
16 Nonrecaptured net Section 1231 losses from: **a** 2013	**16 a**		
b 2012	**b**		
c 2011	**c**		
d 2010	**d**		
e 2009	**e**		
f 2008	**f**		

Kevin S & Dana Kopp 520-78-3614

Loss and Expense Carryovers (cont'd)

				2012	2013
17 AMT Nonrecap'd net Sec 1231 losses from:	a	2013	17 a		
	b	2012	b		
	c	2011	c		
	d	2010	d		
	e	2009	e		
	f	2008	f		

Credit Carryovers

				2012	2013
18 General business credit			18		
19 Adoption credit from:	a	2013	19 a		
	b	2012	b		
20 Mortgage interest credit from:	a	2013	20 a		
	b	2012	b		
	c	2011	c		
	d	2010	d		
21 Credit for prior year minimum tax			21		
22 District of Columbia first-time homebuyer credit			22		
23 Residential energy efficient property credit			23		

Other Carryovers

				2012	2013
24 Section 179 expense deduction disallowed			24		
25 Excess foreign housing deduction:	a	Taxpayer (Form 2555, line 46)	25 a		
	b	Taxpayer (Form 2555, line 48)	b		
	c	Spouse (Form 2555, line 46)	c		
	d	Spouse (Form 2555, line 48)	d		

Charitable Contribution Carryovers

26 **2012** Carryover of charitable contributions from:	Other Property		Capital Gain	
	(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%
a 2012				
b 2011				
c 2010				
d 2009				
e 2008				

27 **2013** Carryover of charitable contributions from:	Other Property		Capital Gain	
	(a) 50%	**(b)** 30%	**(c)** 30%	**(d)** 20%
a 2013				
b 2012				
c 2011				
d 2010				
e 2009				

28 Amount overpaid less earned income credit . . . . . 312.

2012 State Capital Loss Carryovers (For users **not** transferring from the prior year)

State ID	Short-term Capital Loss for State	AMT Short-term Capital Loss for State	Long-term Capital Loss for State	AMT Long-term Capital Loss for State	Capital Loss (combined) for State	AMT Capital Loss (combined) for State

ELECTRONIC POSTMARK - CERTIFICATION OF ELECTRONIC FILING

Taxpayer: Kevin S & Dana Kopp
Primary SSN: 520-78-3614

Federal Return Submitted: March 12, 2014 06:26 PM PDT
Federal Return Acceptance Date: ___________

Your return was electronically transmitted on 03/12/2014

The Intuit Electronic Postmark shows the date and time Intuit received your federal tax return. The Intuit Electronic Postmark documents the filing date of your income tax return, and the electronic postmark information should be kept on file with your tax return and other tax-related documentation.

There are two important aspects of the Intuit Electronic Postmark:

1. THE INTUIT ELECTRONIC POSTMARK.
The electronic postmark shows the date and time Intuit received the federal return, and is deemed the filing date if the date of the electronic postmark is on or before the date prescribed for filing of the federal individual income tax return.

TIMELY FILING:
For your federal return to be considered filed on time, your return must be postmarked on or before midnight April 15, 2014. Intuit's electronic postmark is issued in the Pacific Time (PT) zone. If you are not filing in the PT zone, you will need to add or subtract hours from the Intuit Electronic Postmark time to determine your local postmark time. For example, if you are filing in the Eastern Time (ET) zone and you electronically file your return at 9 AM on April 15, 2014, your Intuit electronic postmark will indicate April 15, 2014, 6 AM. If your federal tax return is rejected, the IRS still considers it filed on time if the electronic postmark is on or before April 15, 2014, and a corrected return is submitted and accepted before April 20, 2014. If your return is submitted after April 20, 2014, a new time stamp is issued to reflect that your return was submitted after the IRS deadline and, consequently, is no longer considered to have been filed on time.

If you request an automatic six-month extension, your return must be electronically postmarked by midnight October 15, 2014 If your federal tax return is rejected, the IRS will still consider it filed on time if the electronic postmark is on or before October 15, 2014, and the corrected return is submitted and accepted by October 20, 2014.

2. THE ACCEPTANCE DATE.
Once the IRS accepts the electronically filed return, the acceptance date will be provided by the Intuit Electronic Filing Center. This date is proof that the IRS accepted the electronically filed return.

File by Mail Instructions for your 2013 Utah Tax Return

Important: Your taxes are not finished until all required steps are completed.

(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Kevin S & Dana Kopp
1337 S Hillside Drive
Saratoga Springs, UT 84045

Balance Due/ Refund	Your Utah state tax return (Form TC-40) shows you owe a balance due of $1,622.00. You are paying by check. You can also pay your balance due by credit card. For more information, go to taxexpress.utah.gov.
What You Need to Mail	Your tax return - The official return for mailing is included in this printout. Remember to sign and date the return. Your payment - Mail a check or money order for $1,622.00, payable to "Utah State Tax Commission". Write your Social Security number and "2013 Form TC-40" on the check. Mail the return and check together. Your payment voucher - This printout includes a payment voucher (Form TC-547). Mail this voucher with your payment. Mail your return, payment and payment voucher to: Utah State Tax Commission 210 North 1950 West Salt Lake City, UT 84134-0266 Deadline: Postmarked by April 15, 2014 Don't forget correct postage on the envelope.
What You Need to Keep	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select File tab, then select the Print for Your Records category.
2013 Utah Tax Return Summary	Taxable Income $ 107,836.00 Total Tax $ 4,938.00 Total Payments/Credits $ 3,316.00 Payment Due $ 1,622.00
Special Formatting	Your printed state tax forms may have special formatting on them, such as bar codes or other symbols. This is to enable fast processing. Don't worry, these forms have been approved by your taxing authority and are acceptable for printing and mailing.

File by Mail Instructions for your 2013 Utah Tax Return

Important: Your taxes are not finished until all required steps are completed.

(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Kevin S & Dana Kopp
1337 S Hillside Drive
Saratoga Springs, UT 84045

Changed Your Mind About e-filing?	You can still file electronically. Just go back to TurboTax, select the File tab, then select the E-file category. We'll walk you through the process. Once you file, we will let you know if your return is accepted (or rejected) by the state taxing agency.

Utah State Tax Commission

Individual Income Tax Return Payment Coupon

TC-547
INTUIT Rev. 12/11

USE OF PAYMENT COUPON
If you have a tax due balance on your Utah individual income tax return and you have previously filed your return (either electronically or by paper) without a payment, include the payment coupon below with your check or money order to insure proper credit to your account. Do not mail another copy of your income tax return with this payment. Sending a duplicate of your return may delay posting of the payment.

If you are sending a payment with your paper Utah individual income tax return, include the payment coupon below with your check or money order, to insure proper credit to your account.

Do not use this return payment coupon to prepay future individual income taxes. Use form TC-546.

ELECTRONIC PAYMENT
You may pay your tax online at **taxexpress.utah.gov**.

HOW TO PREPARE THE PAYMENT
Make your check or money order payable to the Utah State Tax Commission. Do not send cash. The Tax Commission does not assume liability for loss of cash placed in the mail.

Print your name and address, daytime telephone number and the year the payment is for on your check or money order.

SENDING PAYMENT COUPON
If sending this payment coupon separate from your individual income tax return, do **NOT** mail another copy of your return with this payment.

Complete and detach the payment coupon below.

Do not attach (staple, paper clip, etc.) the check or money order to the payment coupon.

Send the payment coupon and payment to:

Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0266

SEPARATE AND RETURN ONLY THE BOTTOM COUPON WITH PAYMENT. KEEP TOP PORTION FOR YOUR RECORDS.

Individual Income Tax Return Payment Coupon

Mail to: Utah State Tax Commission, 210 N 1950 W, SLC UT 84134-0266

INTUIT TC-547
Rev. 12/11

Tax year ending: **2013**

USTC Use Only

Primary taxpayer name	Social Security no.
KEVIN S KOPP	520783614

Secondary taxpayer name	Social Security no.
DANA KOPP	528470103

Address		
1337 S HILLSIDE DRIVE		
City	State	Zip code
SARATOGA SPRINGS	UT	84045

Payment amount enclosed $ 1622.00

IIT004

REV 02/24/14 TTW

Make check or money order payable to the Utah State Tax Commission. Do not send cash. Do not staple check to coupon. Detach check stub.

40301

1555

Utah State Tax Commission

Utah Individual Income Tax Return

All State Income Tax Dollars Fund Education

2013

TC-40

INTUIT

• **Amended Return - enter code** (code 1 - 5 from instructions)

Your Soc. Sec. No.	Your first name	Your last name
520783614	KEVIN	KOPP
Spouse's Soc. Sec. No.	Spouse's first name	Spouse's last name
528470103	DANA	KOPP

Mailing address: 1337 S HILLSIDE DRIVE

Telephone number: 801-636-4074

City: SARATOGA SPRINGS State: UT ZIP + 4: 84045

Foreign country (if not U.S.)

If deceased in 2013 or 2014, complete page 3, Part 1

1 Filing Status - enter code (see instructions)

• 2

- **1** = Single
- **2** = Married filing jointly
- **3** = Married filing separately
- **4** = Head of household
- **5** = Qualifying widow(er)

If using code 2 or 3, enter spouse's name and SSN above

• **2** Exemptions - enter number (see instructions)

a	1	Yourself	from federal return
b	1	Spouse	from federal return
c	3	Dependents	from federal return
d		Dependents with a disability (see instr.)	
e	5	**Total exemptions** (add a through d)	

3 Election Campaign Fund - enter code (see instr.)

- **C** = Constitution
- **D** = Democratic
- **L** = Libertarian
- **R** = Republican
- **N** = No contribution

Yourself: • N Spouse: • N

Does not increase your tax or reduce your refund

4	Federal adjusted gross income from federal return (see instructions)			• 4	107836.
5	Additions to income from TC-40A, Part 1 (attach TC-40A, page 1) (see instructions)			• 5	
6	Total income - add line 4 and line 5			6	107836.
7	State tax refund included on federal form 1040, line 10, if any (see instructions)			• 7	
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1) (see instructions)			• 8	
9	**Utah taxable income (loss) -** subtract the sum of lines 7 and 8 from line 6			• 9	107836.
10	**Utah tax** - multiply line 9 by 5% (.05) (not less than zero)			• 10	5392.
11	Exemption amount - multiply line 2e by $2,925 (if line 4 over $150,000, see instr.)	• 11	14625.		
12	Federal standard or itemized deductions (see instructions)	• 12	15474.		
13	Add line 11 and line 12	13	30099.		
14	State income tax deducted on federal Schedule A, line 5, if any (see instr.)	• 14	4965.		
15	Subtract line 14 from line 13	15	25134.		
16	Initial credit before phase-out - multiply line 15 by 6% (.06)	• 16	1508.		
17	Filing status base amount: if line 1 equals 1 or 3, enter $13,363; if line 1 equals 4, enter $20,045; if line 1 equals 2 or 5, enter $26,726	• 17	26726.		
18	Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	81110.		
19	Phase-out amount - multiply line 18 by 1.3% (.013)	• 19	1054.		
20	Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)			• 20	454.
21	If you are a qualified exempt taxpayer, enter "X" (complete worksheet instructions)	• 21			
22	**Utah income tax** - subtract line 20 from line 10 (not less than zero) (see instructions)			• 22	4938.

Filing electronically is quick, easy and free, and will speed up your refund.

To learn more, go to taxexpress.utah.gov

REV 02/24/14 TTW

Utah Individual Income Tax Return (continued)

23	Enter tax from TC-40, page 1, line 22	23	4938.
24	Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1) (see instructions)	• 24	
25	Full-year resident, subtract line 24 from line 23 (not less than zero) (see instructions) Non or part-year resident, enter tax from TC-40B line 37 (see instructions)	• 25	4938.
26	Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1) (see instructions)	• 26	
27	Subtract line 26 from line 25 (not less than zero)	27	4938.
28	Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, see instructions)	• 28	
29	AMENDED RETURN ONLY - previous refund (see instructions)	• 29	
30	Recapture of low-income housing credit (see instructions)	• 30	
31	Utah use tax (see instructions)	• 31	
32	**Total tax, use tax and additions to tax** (add lines 27 through 31)	32	4938.
33	Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1) (see instructions)	• 33	3316.
34	Credit for Utah income taxes prepaid from TC-546 and 2012 refund applied to 2013 (see instructions)	• 34	
35	Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2) (see instructions)	• 35	
36	Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2) (see instructions)	• 36	
37	AMENDED RETURN ONLY - previous payments (see instructions)	• 37	
38	Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2) (see instructions)	• 38	
39	**Total withholding and refundable credits -** add lines 33 through 38	39	3316.
40	**TAX DUE** - subtract line 39 from line 32 (not less than zero) (see instructions)	• 40	1622.
41	Penalty and interest (see instructions) 41		
42	**TOTAL DUE - PAY THIS AMOUNT** - add line 40 and line 41 (see instructions)	• 42	1622.
43	**REFUND** - subtract line 32 from line 39 (not less than zero) (see instructions)	• 43	
44	Amount of refund on line 43 to be applied to your 2014 taxes (see instr.) • 44		

45 **DIRECT DEPOSIT YOUR REFUND** - provide account information (see instructions for foreign accounts) (see instr.)

• Routing number • Account number Account type: • checking • savings

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules are true, correct and complete.

SIGN HERE	Your signature	Date	Spouse's signature (if filing jointly)	Date

Third Party Designee	Name of designee (if any) you authorize to discuss this return (see instructions)	Designee's telephone number	Designee PIN •
Paid Preparer's Section	Preparer's signature (see instructions) Date	Preparer's telephone number	Preparer's PTIN •
	Firm's name and address SELF-PREPARED		Preparer's EIN •

Attach TC-40 page 3 if you are filing for a deceased taxpayer, filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, requesting a direct deposit to be sent to your Utah Educational Savings Plan, requesting a direct deposit to be sent to a foreign account, or are no longer entitled to a homeowner's exemption.

Part 1 - Utah Withholding Tax Schedule

SSN 520-78-3614

INTUIT **TC-40W** **2013**

Line Explanations:

1 Employer/payer ID number from W-2 box "b" or 1099
2 Utah withholding ID number from W-2 box "15" or 1099
(14 characters, ending in WTH, no hyphens)
3 Employer/payer name and address from W-2 box "c" or 1099
4 Enter "X" if reporting Utah withholding from form 1099
5 Employee's Social Security number from W-2 box "a" or 1099
6 Utah wages or income from W-2 box "16" or 1099
7 Utah withholding tax from W-2 box "17" or 1099

IMPORTANT

Do not send your W-2s or 1099s with your return. Instead, enter W-2 or 1099 information below, but **only** if there is Utah withholding on the form.

Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax.

Enter mineral production withholding from TC-675R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.

1	942854057	043523439
2	11990296004WTH ◀ 14 characters, no hyphens	11960469003WTH ◀ 14 characters, no hyphens
3	IHC HEALTH SERVICES, INC. 36 S STATE SUITE 2200 SALT LAKE CITY UT84111	FIDELITY BROKERAGE SERVICES LLC 82 DEVONSHIRE ST BOSTON MA02109
4		
5	528470103	520783614
6	21233.	72002.
7	7.	3309.

1		
2	◀ 14 characters, no hyphens	◀ 14 characters, no hyphens
3		
4		
5		
6		
7		

Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33 3316.

Submit page ONLY if data entered.
Attach completed schedule to your 2013 Utah Income Tax Return.
Do not attach W-2s or 1099s to your Utah return.