

Electronic Filing Instructions for your 2018 Federal Tax Return

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



Jason R & Marybeth Moore
3014 W Wabansia Ave, Apt. 2
Chicago, IL 60647

Balance Due/Refund	Your federal tax return (Form 1040) shows a refund due to you in the amount of \$364.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 260903839 Routing Transit Number: 071000013.		
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 2019. 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		
2018 Federal Tax Return Summary	Adjusted Gross Income	\$	85,168.00
	Taxable Income	\$	61,168.00
	Total Tax	\$	6,960.00
	Total Payments/Credits	\$	7,324.00
	Amount to be Refunded	\$	364.00
	Effective Tax Rate		8.17%



Hi Jason and Marybeth,

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 2018 taxes:

Your federal refund is: \$ 364.00

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 provide the Audit Support Center free of charge, in the unlikely event you get audited.

Many happy returns from TurboTax.

Filing status: ☐ Single ☒ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

Your first name and initial: Jason R Last name: Moore Your social security number: 354-78-7136

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: Marybeth Last name: Moore Spouse's social security number: 341-82-4102

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Spouse was born before January 2, 1954 ☒ Full-year health care coverage or exempt (see inst.)

☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. 3014 W Wabansia Ave Apt. no. 2 Presidential Election Campaign (see inst.) ☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. Chicago IL 60647 If more than four dependents, see inst. and ✓ here ☐

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

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: Department Administrator

Spouse's signature. If a joint return, **both** must sign. _____ Date: _____ Spouse's occupation: Teacher

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Preparer's name: _____ Preparer's signature: _____ PTIN: _____ Firm's EIN: _____ Check if: ☐ 3rd Party Designee ☐ Self-employed

Firm's name ▶ Self-Prepared Phone no. _____

Firm's address ▶ _____

Paid Preparer Use Only

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

1 Wages, salaries, tips, etc. Attach Form(s) W-2	1 85,418.
2a Tax-exempt interest	2b
3a Qualified dividends	3b
4a IRAs, pensions, and annuities	4b
5a Social security benefits	5b
6 Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22	6 85,418.
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 85,168.
8 Standard deduction or itemized deductions (from Schedule A)	8 24,000.
9 Qualified business income deduction (see instructions)	9
10 Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0-	10 61,168.
11 a Tax (see inst.) 6,960. (check if any from: 1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/>)	11 6,960.
b Add any amount from Schedule 2 and check here <input type="checkbox"/>	12
12 a Child tax credit/credit for other dependents b Add any amount from Schedule 3 and check here <input type="checkbox"/>	13 6,960.
13 Subtract line 12 from line 11. If zero or less, enter -0-	14 0.
14 Other taxes. Attach Schedule 4	15 6,960.
15 Total tax. Add lines 13 and 14	16 7,324.
16 Federal income tax withheld from Forms W-2 and 1099	17
17 Refundable credits: a EIC (see inst.) No b Sch. 8812 c Form 8863	18 7,324.
Add any amount from Schedule 5	19 364.
18 Add lines 16 and 17. These are your total payments	20a 364.
19 If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you overpaid	
20a Amount of line 19 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	
▶ b Routing number 071000013 ▶ c Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings	
▶ d Account number 260903839	
21 Amount of line 19 you want applied to your 2019 estimated tax	22
22 Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions	23
23 Estimated tax penalty (see instructions)	

SCHEDULE 1
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Income and Adjustments to Income

► **Attach to Form 1040.**
► **Go to www.irs.gov/Form1040 for instructions and the latest information.**

OMB No. 1545-0074

2018
Attachment
Sequence No. **01**

Name(s) shown on Form 1040

Jason R & Marybeth Moore

Your social security number

354-78-7136

Additional Income	1-9b	Reserved	1-9b	
	10	Taxable refunds, credits, or offsets of state and local income taxes	10	0.
	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 ► <input type="checkbox"/>	13	
	14	Other gains or (losses). Attach Form 4797	14	
	15a	Reserved	15b	
	16a	Reserved	16b	
	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	Reserved	20b	
	21	Other income. List type and amount ►	21	
	22	Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23	22	0.
Adjustments to Income	23	Educator expenses	23	250.
	24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	24	
	25	Health savings account deduction. Attach Form 8889	25	
	26	Moving expenses for members of the Armed Forces. 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	Reserved	34	
	35	Reserved	35	
	36	Add lines 23 through 35	36	250.

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

Schedule 1 (Form 1040) 2018

REV 12/21/18 TTO

Electronic Filing Instructions for your 2018 Illinois Tax Return

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



Jason R & Marybeth Moore
3014 W Wabansia Ave
Chicago, IL 60647

Balance Due/Refund	Your Illinois state tax return (Form IL-1040) shows a refund due to you in the amount of \$233.00. Your tax refund will be direct deposited into your account. The account information you entered - Account Number: 260903839 Routing Transit Number: 071000013.		
Where's My Refund?	Before you call the Illinois Department of Revenue with questions about your refund, give them 21 days processing time from the date your return is accepted. If then you have not received your refund, or the amount is not what you expected, contact the Illinois Department of Revenue directly at 1-217-782-3336. From outside of Illinois use 1-800-732-8866. You can also visit the Illinois Department of Revenue web site at www.Iltax.com .		
What You Need to Sign	Sign and date Form IL-8453 within 1 day of acceptance. Since you are married filing jointly, your spouse must also sign and date the form.		
Do Not Mail	Do not mail a paper copy of your tax return. Since you filed electronically, the Illinois Department of Revenue already has your return.		
What You Need to Keep	Your Electronic Filing Instructions (this form) Printed copy of your state and federal returns Copies of all W-2 and 1099 forms Copies of other states' tax returns, if applicable		
2018 Illinois Tax Return Summary	Taxable Income	\$	80,718.00
	Total Tax	\$	3,996.00
	Total Payments/Credits	\$	4,229.00
	Amount to be Refunded	\$	233.00



Illinois Department of Revenue

2018 Form IL-1040

Individual Income Tax Return

or for fiscal year ending ____/____/____

Over 80% of taxpayers file electronically. It is easy and you will get your refund faster. Visit tax.illinois.gov.

Step 1: Personal Information

A

354-78-7136

341-82-4102

Jason R

Moore

Marybeth

Moore

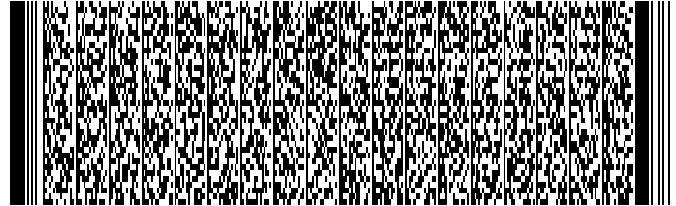
3014 W Wabansia Ave

2

Chicago

IL

60647

B Filing status: ☐ Single or head of household ☒ Married filing jointly ☐ Married filing separately ☐ WidowedC **Check** If someone can claim you, or your spouse if filing jointly, as a dependent. See instructions. ☐ You ☐ SpouseD **Check** the box if this applies to you during 2018: ☐ Nonresident - **Attach** Sch. NR ☐ Part-year resident - **Attach** Sch. NR

Step 2: Income

(Whole dollars only)

1 Federal adjusted gross income from your federal Form 1040, Line 7. **1** 85,168.00

2 Federally tax-exempt interest and dividend income from your federal Form 1040, Line 2a. **2** .00

3 Other additions. **Attach** Schedule M. **3** .00

4 **Total income.** Add Lines 1 through 3. **4** 85,168.00

Step 3: Base Income

5 Social Security benefits and certain retirement plan income received if included in Line 1. **Attach** Page 2 of federal return. **5** .00

6 Illinois Income Tax overpayment included in federal Form 1040, Schedule 1, Ln. 10. **6** .00

7 Other subtractions. **Attach** Schedule M. **7** .00

Check if Line 7 includes any amount from Schedule 1299-C. ☐

8 Add Lines 5, 6, and 7. This is the total of your subtractions. **8** .00

9 **Illinois base income.** Subtract Line 8 from Line 4. **9** 85,168.00

Step 4: Exemptions

10 a Enter the exemption amount for yourself and your spouse. See instructions. **a** 4,450.00

b **Check** if 65 or older: ☐ You + ☐ Spouse # of checkboxes **X** \$1,000 = **b** .00

c **Check** if legally blind: ☐ You + ☐ Spouse # of checkboxes **X** \$1,000 = **c** .00

d If you are claiming dependents, enter the amount from Schedule IL-E/EIC, Step 2, Line 1. **d** 0.00

Attach Schedule IL-E/EIC.

Exemption allowance. Add Lines a through d. **10** 4,450.00

Step 5: Net Income and Tax

11 **Residents: Net income.** Subtract Line 10 from Line 9.

Nonresidents and part-year residents: Enter the **Illinois net income** from Schedule NR. **Attach** Schedule NR. **11** 80,718.00

12 **Residents:** Multiply Line 11 by 4.95% (.0495). Cannot be less than zero.

Nonresidents and part-year residents: Enter the tax from Schedule NR. **12** 3,996.00

13 Recapture of investment tax credits. **Attach** Schedule 4255. **13** .00

14 **Income tax.** Add Lines 12 and 13. Cannot be less than zero. **14** 3,996.00

Step 6: Tax After Nonrefundable Credits

15 Income tax paid to another state while an Illinois resident. **Attach** Schedule CR. **15** .00

16 Property tax and K-12 education expense credit amount from Schedule ICR. **Attach** Schedule ICR. **16** .00

17 Credit amount from Schedule 1299-C. **Attach** Schedule 1299-C. **17** .00

18 Add Lines 15, 16, and 17. This is the total of your credits. Cannot exceed the tax amount on Line 14. **18** 0.00

19 **Tax after nonrefundable credits.** Subtract Line 18 from Line 14. **19** 3,996.00

Step 7: Other Taxes

20 Household employment tax. See instructions. **20** .00

21 Use tax on internet, mail order, or other out-of-state purchases from UT Worksheet or UT Table in the instructions. **Do not** leave blank. **21** 0.00

22 Compassionate Use of Medical Cannabis Pilot Program Act Surcharge. **22** .00

23 **Total Tax.** Add Lines 19, 20, 21, and 22. **23** 3,996.00



Staple W-2 and 1099 forms here

Staple your check and IL-1040-V

24 Total tax from Page 1, Line 23.

24 3,996.00

Step 8: Payments and Refundable Credit

25 Illinois Income Tax withheld. **Attach** Schedule IL-WIT. 25 4,229.00

26 Estimated payments from Forms IL-1040-ES and IL-505-I, including any overpayment applied from a prior year return. 26 .00

27 Pass-through withholding. **Attach** Schedule K-1-P or K-1-T. 27 .00

28 Earned Income Credit from Schedule IL-E/EIC, Step 4, Line 8. **Attach** Schedule IL-E/EIC. 28 .00

29 **Total payments and refundable credit.** Add Lines 25 through 28. 29 4,229.00

Step 9: Total

30 If Line 29 is greater than Line 24, subtract Line 24 from Line 29. 30 233.00

31 If Line 24 is greater than Line 29, subtract Line 29 from Line 24. 31 .00

Step 10: Underpayment of Estimated Tax Penalty and Donations - Only complete Step 10 for late-payment penalty for underpayment of estimated tax or to make a voluntary charitable donation.

32 Late-payment penalty for underpayment of estimated tax. 32 .00

a ☐ Check if at least two-thirds of your federal gross income is from farming.

b ☐ Check if you or your spouse are 65 or older and permanently living in a nursing home.

c ☐ Check if your income was not received evenly during the year and you annualized your income on Form IL-2210. **Attach** Form IL-2210.

d ☐ Check if you were not required to file an Illinois Individual Income Tax return in the previous tax year.

33 Voluntary charitable donations. **Attach** Schedule G. 33 .00

34 **Total penalty and donations.** Add Lines 32 and 33. 34 .00

Step 11: Refund

35 If you have an amount on Line 30 and this amount is greater than Line 34, subtract Line 34 from Line 30. This is your **overpayment**. 35 233.00

36 Amount from Line 35 you want **refunded to you**. Check **one** box on Line 37. See instructions. 36 233.00

37 I choose to receive my refund by

a ☒ **direct deposit** - Complete the information below if you check this box.

Routing number 0 7 1 0 0 0 0 1 3 ☒ Checking or ☐ Savings

Account number 2 6 0 9 0 3 8 3 9

b ☐ **Illinois Individual Income Tax refund debit card.**

c ☐ **paper check.**

38 Amount to be **credited forward**. Subtract Line 36 from Line 35. See instructions. 38 .00

Step 12: Amount You Owe

39 If you have an amount on Line 31, add Lines 31 and 34. - or -
If you have an amount on Line 30 and this amount is less than Line 34, subtract Line 30 from Line 34. This is the **amount you owe**. See instructions. 39 .00

Step 13: If this is a joint return, both you and your spouse must sign below.

Under penalties of perjury, I state that I have examined this return and, to the best of my knowledge, it is true, correct, and complete.

Sign Here					(630) 470-7386
	Your signature	Date (mm/dd/yyyy)	Spouse's signature	Date (mm/dd/yyyy)	Daytime phone number
Paid Preparer Use Only	Print/Type paid preparer's name		Self-Prepared		<input type="checkbox"/> Check if self-employed
	Paid preparer's signature		Date (mm/dd/yyyy)	Paid Preparer's PTIN	
	Firm's name ▶		Firm's FEIN ▶		
	Firm's address ▶		Firm's phone ▶	()	
Third Party Designee	Designee's name (please print)		()		<input type="checkbox"/> Check if the Department may discuss this return with the third party designee shown in this step.
	Designee's phone number				



If no payment enclosed, mail to:
ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62719-0001



If payment enclosed, mail to:
ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62726-0001





Attach to your Form IL-1040. If you have more than five withholding forms, complete multiple copies of this schedule.

IL Attachment No. 31

Use the reference for Column A shown in the chart below.

Form Type	Letter Code for Column A	Form Type	Letter Code for Column A
W-2	W	1099-DIV	D
W-2G	WG	1099-INT	I
1099-R	R	1042-S	S
1099-G	G	1099-B	B
1099-MISC	M	1099-K	K
1099-OID	O		

Step 1: Provide your withholding records (includes all W-2 and 1099 forms)

Jason R Moore

Your name as shown on Form IL-1040

3 5 4 - 7 8 - 7 1 3 6
Your Social Security number

Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
1 <u>W</u>	<u>36-2177139</u>	\$ <u>40,663.00</u>	\$ <u>40,663.00</u>	\$ <u>2,013.00</u>
2 _____	_____	\$ _____	\$ _____	\$ _____
3 _____	_____	\$ _____	\$ _____	\$ _____
4 _____	_____	\$ _____	\$ _____	\$ _____
5 _____	_____	\$ _____	\$ _____	\$ _____

Step 2: Provide spouse's withholding records (includes all W-2 and 1099 forms)

Marybeth Moore

Your spouse's name as shown on Form IL-1040

3 4 1 - 8 2 - 4 1 0 2
Your spouse's Social Security number

Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
6 <u>W</u>	<u>36-2167764</u>	\$ <u>43,593.00</u>	\$ <u>43,593.00</u>	\$ <u>2,158.00</u>
7 <u>W</u>	<u>46-1874301</u>	\$ <u>1,162.00</u>	\$ <u>1,162.00</u>	\$ <u>58.00</u>
8 _____	_____	\$ _____	\$ _____	\$ _____
9 _____	_____	\$ _____	\$ _____	\$ _____
10 _____	_____	\$ _____	\$ _____	\$ _____

Step 3: Total Illinois withholding**11 Add the amounts in Column E for Lines 1 through 10 (and the amounts from Column E of any additional copies you attached). This is the total amount of your Illinois income tax withheld.**

Enter this amount here and on Form IL-1040, Line 25.

11 \$ 4,229.00**➔ Attach all Schedules IL-WIT to your IL-1040. ➔**