

ALFRED HAMILTON

2004 FORM 1040

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick



Davila & Buschhorn
& Associates, P. C.

Your Future, Our Business

Davila, Buschhorn & Associates, P.C.
7207 McNeil Dr.
Austin, Texas 78729-7610
512-258-6637 / 512-258-7699 Fax

August 28, 2008

Alfred & Maurine P. Hamilton
9008 East Dr.
Austin, TX 78753-5112

TAXPAYER'S COPY
DAVILA, BUSCHHORN & ASSOCIATES, P.C.
Certified Public Accountants

Dear Alfred:

Enclosed is the decedent's 2004 income tax return. The return should be signed and dated by the executor of the estate.

Specific filing instructions are as follows.

FEDERAL INCOME TAX RETURN:

Mail your return on or before September 1, 2008.

Mail to - Internal Revenue Service Center
P.O. Box 660308
Dallas, TX 75266-0308

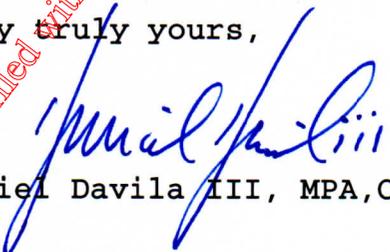
Enclose your check for \$28,116, payable to the United States Treasury. Include your social security number, daytime phone number and the words "2004 Form 1040" on your check.

Also enclose Form 1040-V. Do not attach Form 1040-V or your payment to your return or to each other. Please leave Form 1040-V and your payment loose in the envelope.

Your income tax return includes a penalty for underpayment of estimated tax from Form 2210 of \$454, a late payment penalty of \$3256, late payment interest of \$4951 and a late filing penalty of \$3573.

Your copy of the return is enclosed for your files. We suggest that you retain this copy indefinitely.

Very truly yours,


Daniel Davila III, MPA, CPA, PFS, CRC

Fraudulent-filed with IRS in 10/6/2008 by County Deed and Sylvia Hamilton - No 1041-11-4684s - The Dunning Trust Trick

Two-Year Comparison Worksheet

2004

Name(s) as shown on return

Social security number

ALFRED & MAURINE P. HAMILTON

458-24-4617

2003 Filing Status **MARRIED FILING JOINT**

2004 Filing Status **MARRIED FILING JOINT**

2003 Tax Bracket **33.0%**

2004 Tax Bracket **28.0%**

Description	Tax Year 2003	Tax Year 2004	Increase (Decrease)
SCHEDULE B - TAXABLE INTEREST	2034.	2443.	409.
SCHEDULE D (CAPITAL GAIN/LOSS)	63311.	0.	-63311.
TAXABLE IRA DISTRIBUTIONS	3423.	60006.	56583.
TAXABLE PENSIONS AND ANNUITIES	133790.	101828.	-31962.
SCHEDULE E (RENTAL AND PASSTHROUGH)	-1624.	0.	1624.
TAXABLE SOCIAL SECURITY BENEFITS	28033.	22016.	-6017.
OTHER INCOME	-4118.	0.	4118.
TOTAL INCOME	224849.	186293.	-38556.
ADJUSTED GROSS INCOME	224849.	186293.	-38556.
STANDARD DEDUCTION	11400.	11600.	200.
INCOME BEFORE EXEMPTIONS	213449.	174693.	-38756.
PERSONAL EXEMPTIONS	5246.	6200.	954.
TAXABLE INCOME	208203.	168493.	-39710.
TAX	44280.	37136.	-7144.
TAX BEFORE CREDITS	44280.	37136.	-7144.
TAX AFTER NON-REFUNDABLE CREDITS	44280.	37136.	-7144.
TOTAL TAX	44280.	37136.	-7144.
FEDERAL INCOME TAX WITHHELD	10471.	4538.	-5933.
ESTIMATED TAX PAYMENTS	18580.	16716.	-1864.
TOTAL PAYMENTS	29051.	21254.	-7797.
FORM 2210/2210F (EST. TAX PENALTY)	9.	454.	445.
BALANCE DUE (INCLUDING 2210/2210F)	15238.	16336.	1098.
LATE PAYMENT/LATE FILING PEN. & INT.	561.	11780.	11219.
TOTAL DUE AFTER PENALTY & INTEREST	15799.	28116.	12317.

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton No 041-K1s-4684s The Disappearing Tax Trick

Paperwork Reduction Act Notice.

We ask for the information on Form 1040-V to help us carry out the Internal Revenue laws of the United States. If you use Form 1040-V, you must provide the requested information. Your cooperation will help us ensure that we are collecting the right amount of tax.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Internal Revenue Code section 6103.

The time needed to complete and mail Form 1040-V will vary depending on individual circumstances. The estimated average time is 12 minutes. If you have comments about the accuracy of this time estimate or suggestions for making Form 1040-V simpler, we would be happy to hear from you. See the Instructions for Form 1040.

Form **1040-V** (2004)

▼ Detach Here and Mail With Your Payment and Return ▼

Form **1040-V**

Payment Voucher

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Do not staple or attach this voucher to your payment or return.

2004

1 Your social security number (SSN)	2 If a joint return, SSN shown second on your return	3 Amount you are paying by check or money order	Dollars	Cents
458 24 4617	459 20 2593		28116	
4 Your first name and initial ALFRED		Last name HAMILTON		
If a joint return, spouse's first name and initial MAURINE P.		Last name HAMILTON		
Home address (number and street) 9008 EAST DR.				Apt. no.
City, town or post office, state, and ZIP code AUSTIN, TX 78753-5112				

From the IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

DECEASED

Form

1040

U.S. Individual Income Tax Return

2004

(99)

IRS Use Only - Do not write or staple in this space.

Label

(See instructions on page 16.)

Use the IRS label.

Otherwise, please print or type.

Presidential Election Campaign

(See page 16.)

For the year Jan. 1-Dec. 31, 2004, or other tax year beginning		, 2004, ending		, 20		OMB No. 1545-0074	
L A B E L H E R E	Your first name and initial ALFRED			Last name (DEC. 04/08/04) HAMILTON		Your social security number 458 24 4617	
	If a joint return, spouse's first name and initial MAURINE P.			Last name (DEC. 10/06/06) HAMILTON		Spouse's social security number 459 20 2593	
	Home address (number and street). If you have a P.O. box, see page 16. 9008 EAST DR.					Apt. no.	
City, town or post office, state, and ZIP code. If you have a foreign address, see page 16. AUSTIN, TX 78753-5112							

Important!
You must enter your SSN(s) above.

Note. Checking "Yes" will not change your tax or reduce your refund.

Do you, or your spouse if filing a joint return, want \$3 to go to this fund? Yes No Yes No

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 page 17.) 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 page 17)

Exemptions

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

b Spouse

c Dependents:		(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input type="checkbox"/> If qualifying child for child tax credit (see page 18)
(1) First name	Last name			

d Total number of exemptions claimed **2**

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 page 19.

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

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	
8a	Taxable interest. Attach Schedule B if required	8a	2443.
b	Tax-exempt interest. Do not include on line 8a	8b	
9a	Ordinary dividends. Attach Schedule B if required	9a	
b	Qualified dividends (see page 20)	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 -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	IRA distributions	15a	
b	Taxable amount (see page 22)	15b	60006.
16a	Pensions and annuities	16a	729396.
b	Taxable amount (see page 22)	16b	101828.
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	0.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits	20a	25901.
b	Taxable amount (see page 24)	20b	22016.
21	Other income. List type and amount (see page 24)	21	
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	186293.

Adjusted Gross Income

23	Educator expenses (see page 26)	23	
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	IRA deduction (see page 26)	25	
26	Student loan interest deduction (see page 28)	26	
27	Tuition and fees deduction (see page 29)	27	
28	Health savings account deduction. Attach Form 8889	28	
29	Moving expenses. Attach Form 3903	29	
30	One-half of self-employment tax. Attach Schedule SE	30	
31	Self-employed health insurance deduction (see page 30)	31	
32	Self-employed SEP, SIMPLE, and qualified plans	32	
33	Penalty on early withdrawal of savings	33	
34a	Alimony paid b Recipient's SSN	34a	
35	Add lines 23 through 34a	35	
36	Subtract line 35 from line 22. This is your adjusted gross income	36	186293.

410001 11-03-04

Tax and Credits

Standard Deduction for -

People who checked any box on line 38a or 38b or who can be claimed as a dependent.

All others: Single or Married filing separately, \$4,850

Married filing jointly or Qualifying widow(er), \$9,700

Head of household, \$7,150

Table with 3 columns: Line number, Description, and Amount. Includes lines 37-56 for Tax and Credits.

Other Taxes

Table with 3 columns: Line number, Description, and Amount. Includes lines 57-62 for Other Taxes.

Payments

If you have a qualifying child, attach Schedule EIC.

Table with 3 columns: Line number, Description, and Amount. Includes lines 63-70 for Payments.

Refund

Direct deposit? See page 54 and fill in 72b, 72c, and 72d.

Table with 3 columns: Line number, Description, and Amount. Includes lines 71-74 for Refund.

Amount You Owe

Table with 3 columns: Line number, Description, and Amount. Includes line 75 for Amount You Owe.

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 56)? [X] Yes. Complete the following. [] No

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.

Paid Preparer's Use Only

Preparer's signature: [Signature] Date: 8-28-08. Firm's name: DAVILA, BUSCHHORN & ASSOC., PC. Address: 7207 MCNEIL DR. AUSTIN, TEXAS 78729-7610.

** INTEREST NOT INCLUDED 4951. ** PENALTY NOT INCLUDED 3256. ** LATE FILING PENALTY NOT INCLUDED 3573. **** TOTAL DUE 28116.

Underpayment of Estimated Tax by Individuals, Estates, and Trusts

Department of the Treasury
Internal Revenue Service

▶ See separate instructions.
▶ Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

2004
Attachment
Sequence No. **06**

Name(s) shown on tax return

Identifying number

ALFRED & MAURINE P. HAMILTON

458-24-4617

Do You Have To File Form 2210?

Complete lines 1 through 7 below. Is line 7 less than \$1,000?

Yes → **Do not file Form 2210. You do not owe a penalty.**

No ↓

Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?

Yes → You do not owe a penalty. **Do not file Form 2210** (but if box E applies, you must file page 1 of Form 2210).

No ↓

You may owe a penalty. Does any box in Part II below apply?

Yes → You must file Form 2210. Does box B, C, or D apply?

No ↓

Yes → You must figure your penalty.

Do not file Form 2210. You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return (see page 2 of the instructions), but **do not file Form 2210.**

You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return (see page 2 of the instructions), but **file only page 1 of Form 2210.**

Part I Required Annual Payment (see page 2 of the instructions)

1 Enter your 2004 tax after credits from Form 1040, line 56 (or comparable line of your return)	1	37136.
2 Other taxes, including self-employment tax (see page 2 of the instructions)	2	
3 Refundable credits. Enter the total of your earned income credit, additional child tax credit, credit for federal tax paid on fuels, and health coverage tax credit for eligible individuals	3	()
4 Current year tax. Combine lines 1, 2, and 3	4	37136.
5 Multiply line 4 by 90% (.90)	5	33422.
6 Withholding taxes. Do not include estimated tax payments. See page 2 of the instructions	6	4538.
7 Subtract line 6 from line 4. If less than \$1,000, you do not owe a penalty; do not file Form 2210	7	32598.
8 Maximum required annual payment based on prior year's tax (see page 2 of the instructions)	8	48708.
9 Required annual payment. Enter the smaller of line 5 or line 8	9	33422.

- Next:** Is line 9 more than line 6?
- No.** You **do not** owe a penalty. **Do not file Form 2210** unless box E below applies.
- Yes.** You may owe a penalty, but **do not file Form 2210** unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
 - If only box A or E (or both) applies, file only page 1 of Form 2210. You are **not** required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or Part IV as a worksheet and enter your penalty on your tax return (see page 2 of the instructions), but **file only page 1 of Form 2210.**

Part II Reasons for Filing. Check applicable boxes. If none apply, do not file Form 2210.

- A You request a **waiver** (see page 1 of the instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you are not required to figure your penalty.
- B You request a **waiver** (see page 1 of the instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D Your penalty is lower when figured by treating the federal income tax withheld from your wages as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E You filed or are filing a joint return for either 2003 or 2004, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you are **not** required to figure your penalty (unless box B, C, or D applies).

Part IV Regular Method (See page 2 of the instructions if you are filing Form 1040NR or 1040NR-EZ.)

Section A - Figure Your Underpayment		Payment Due Dates				
		(a) 4/15/04	(b) 6/15/04	(c) 9/15/04	(d) 1/15/05	
18	Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 25. Otherwise, enter 25% (.25) of line 9, Form 2210, in each column	18	8356.	8356.	8356.	8354.
19	Estimated tax paid and tax withheld. For column (a) only, also enter the amount from line 19 on line 23. If line 19 is equal to or more than line 18 for all payment periods, stop here; you do not owe a penalty. Do not file Form 2210 unless you checked a box in Part II	19	1135.	1135.	13672.	5312.
Complete lines 20 through 26 of one column before going to the next column.						
20	Enter the amount, if any, from line 26 in previous column	20				
21	Add lines 19 and 20	21		1135.	13672.	5312.
22	Add the amounts on lines 24 and 25 in previous column	22		7221.	14442.	9126.
23	Subtract line 22 from line 21. If zero or less, enter -0-. For column (a) only, enter the amount from line 19	23	1135.	0.	0.	0.
24	If line 23 is zero, subtract line 21 from line 22. Otherwise, enter -0-	24		6086.	770.	
25	Underpayment. If line 18 is equal to or more than line 23, subtract line 23 from line 18. Then go to line 20 of the next column. Otherwise, go to line 26	25	7221.	8356.	8356.	8354.
26	Overpayment. If line 23 is more than line 18, subtract line 18 from line 23. Then go to line 20 of the next column	26				

Section B - Figure the Penalty (Complete lines 27 through 34 of one column before going to the next column.)

Rate Period 1	April 16, 2004 - June 30, 2004		4/15/04	6/15/04		
	27	Number of days from the date shown above line 27 to the date the amount on line 25 was paid or 6/30/04, whichever is earlier	Days:	Days:		
	27					
	28	Underpayment on line 25 x $\frac{\text{Number of days on line 27}}{366} \times .05$	\$	\$		
Rate Period 2	July 1, 2004 - September 30, 2004		6/30/04	6/30/04	9/15/04	
	29	Number of days from the date shown above line 29 to the date the amount on line 25 was paid or 9/30/04, whichever is earlier	Days:	Days:	Days:	
	29					
	30	Underpayment on line 25 x $\frac{\text{Number of days on line 29}}{366} \times .04$	\$	\$	\$	
Rate Period 3	October 1, 2004 - December 31, 2004		9/30/04	9/30/04	9/30/04	
	31	Number of days from the date shown above line 31 to the date the amount on line 25 was paid or 12/31/04, whichever is earlier	Days:	Days:	Days:	
	31					
	32	Underpayment on line 25 x $\frac{\text{Number of days on line 31}}{366} \times .05$	\$	\$	\$	
Rate Period 4	January 1, 2005 - April 15, 2005		12/31/04	12/31/04	12/31/04	1/15/05
	33	Number of days from the date shown above line 33 to the date the amount on line 25 was paid or 4/15/05, whichever is earlier	Days:	Days:	Days:	Days:
	33		SEE ATTACHED WORKSHEET			
	34	Underpayment on line 25 x $\frac{\text{Number of days on line 33}}{365} \times .05$	\$	\$	\$	\$

35 Penalty. Add all amounts on lines 28, 30, 32, and 34 in all columns. Enter the total here and on Form 1040, line 75; Form 1040A, line 48; Form 1040NR, line 73; Form 1040NR-EZ, line 26; or Form 1041, line 26, **but do not file Form 2210 unless you checked a box in Part II**

35 \$ **454.**

Name(s) shown on Form 1040. Do not enter name and social security number if shown on page 1.

Your social security number

ALFRED & MAURINE P. HAMILTON

458 24 4617

Schedule B - Interest and Ordinary Dividends

Attachment Sequence No. 08

Part I Interest

1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address

BANK OF AMERICA

GUARANTY BANK

YOAKUM NATL BANK

YOAKUM NATL BANK

UNITED OF OMAHA

RANDOLPH BROOKS FCU

Amount

764.

285.

10.

310.

52.

1022.

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

2 Add the amounts on line 1

2443.

3 Excludable interest on series EE and I U.S. savings bonds issued after 1989.

Attach Form 8815

4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a

2443.

Note: If line 4 is over \$1,500, you must complete Part III.

Part II Ordinary Dividends

5 List name of payer

Amount

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

6 Add the amounts on line 5. Enter the total here and on Form 1040, line 9a

Note: If line 6 is over \$1,500, you must complete Part III.

Part III Foreign Accounts and Trusts

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; or (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

7a At any time during 2004, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

Yes No

X

b If "Yes," enter the name of the foreign country

8 During 2004, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

If "Yes," you may have to file Form 3520. See page B-2

X

Farm Rental Income and Expenses
 (Crop and Livestock Shares (Not Cash) Received by Landowner (or Sub-Lessor))
 (Income not subject to self-employment tax)
 Attach to Form 1040.

Name(s) shown on Form 1040

Your social security number
458-24-4617
 Employer ID number (EIN), if any

ALFRED HAMILTON (DEC. 04/08/04)

A Did you actively participate in the operation of this farm during 2004? Yes No

Part I Gross Farm Rental Income - Based on Production. Include amounts converted to cash or the equivalent.			
1	Income from production of livestock, produce, grains, and other crops		1
2a	Cooperative distributions (Form(s) 1099-PATR)	2a	2b Taxable amount
3a	Agricultural program payments	3a	3b Taxable amount
4	Commodity Credit Corporation (CCC) loans:		
a	CCC loans reported under election		4a
b	CCC loans forfeited	4b	4c Taxable amount
5	Crop insurance proceeds and certain disaster payments:		
a	Amount received in 2004	5a	5b Taxable amount
c	If election to defer to 2005 is attached, check here <input type="checkbox"/>	5d Amount deferred from 2003	5d
6	Other income, including Federal and state gasoline or fuel tax credit or refund	SEE STATEMENT 7	
7	Gross farm rental income. Add amounts in the right column for lines 1 through 6. Enter the total here, and on Schedule E (Form 1040), line 42		7 570.

Part II Expenses - Farm Rental Property. Do not include personal or living expenses.			
8	Car and truck expenses. Also attach Form 4562	8	
9	Chemicals	9	
10	Conservation expenses	10	
11	Custom hire (machine work)	11	
12	Depreciation and section 179 expense deduction not claimed elsewhere	12	
13	Employee benefit programs other than on line 21 (see Schedule F instructions)	13	
14	Feed purchased	14	
15	Fertilizers and lime	15	
16	Freight and trucking	16	
17	Gasoline, fuel, and oil	17	
18	Insurance (other than health)	18	349.
19	Interest:		
a	Mortgage (paid to banks, etc.)	19a	
b	Other	19b	
20	Labor hired (less employment credits)	20	
21	Pension and profit-sharing plans	21	
22	Rent or lease:		
a	Vehicles, machinery, and equipment	22a	
b	Other (land, animals, etc.)	22b	
23	Repairs and maintenance	23	
24	Seeds and plants purchased	24	
25	Storage and warehousing	25	
26	Supplies purchased	26	
27	Taxes	27	581.
28	Utilities	28	144.
29	Veterinary, breeding, and medicine	29	
30	Other expenses (specify):		
a	PROFESSIONAL FEES	30a	350.
b	-----	30b	
c	-----	30c	
d	-----	30d	
e	-----	30e	
f	-----	30f	
g	-----	30g	
31	Total expenses. Add lines 8 through 30g	31	1424.
32	Net farm rental income or (loss). Subtract line 31 from line 7. If the result is income, enter it here and on Schedule E, line 40. If the result is a loss, you must go on to line 33	32	-854.
33	If line 32 is a loss, you must check the box that describes your investment in this activity (see instructions)	33a	<input checked="" type="checkbox"/> All investment is at risk.
	You may need to complete Form 8582 to determine your deductible loss, regardless of which box you check (see instructions). However, if you checked box 33b, you must complete Form 6198 before going to Form 8582. In either case, enter the deductible loss here and on Schedule E, line 40	33b	<input type="checkbox"/> Some investment is not at risk.
	PAL	33c	0.

LHA For Paperwork Reduction Act Notice, see separate instructions.

Passive Activity Loss Limitations

▶ See separate instructions.
▶ Attach to Form 1040 or Form 1041.

Name(s) shown on return

Identifying number

ALFRED & MAURINE P. HAMILTON

458-24-4617

Part I 2004 Passive Activity Loss Caution: See the instructions for Worksheets 1, 2, and 3 on pages 7 and 8 before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation see Special Allowance for Rental Real Estate Activities on page 3 of the instructions.)

1a Activities with net income (enter the amount from Worksheet 1, column (a))	1a		
b Activities with net loss (enter the amount from Worksheet 1, column (b))	1b	-854.	
c Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	1c		
d Combine lines 1a, 1b, and 1c	1d		-854.

Commercial Revitalization Deductions From Rental Real Estate Activities

2a Commercial revitalization deductions from Worksheet 2, column (a)	2a		
b Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b		
c Add lines 2a and 2b	2c		

All Other Passive Activities

3a Activities with net income (enter the amount from Worksheet 3, column (a))	3a		
b Activities with net loss (enter the amount from Worksheet 3, column (b))	3b		
c Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	3c		
d Combine lines 3a, 3b, and 3c	3d		

4 Combine lines 1d, 2c, and 3d. If the result is net income or zero, all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Do not complete Form 8582. Report the losses on the forms and schedules normally used	4		-854.
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- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
 - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

Caution: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II or Part III. Instead, go to line 15.

Part II Special Allowance for Rental Real Estate With Active Participation

Note: Enter all numbers in Part II as positive amounts. See page 8 for an example.

5 Enter the smaller of the loss on line 1d or the loss on line 4	5	854.	
6 Enter \$150,000. If married filing separately, see the instructions	6	150000.	
7 Enter modified adjusted gross income, but not less than zero (see the instr.)	7	164277.	STATEMENT 12
8 Subtract line 7 from line 6	8	0.	
9 Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see the instructions	9		
10 Enter the smaller of line 5 or line 9	10		

Part III Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Activities

Note: Enter all numbers in Part III as positive amounts. See the example for Part II on page 8.

11 Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11		
12 Enter the loss from line 4	12		
13 Reduce line 12 by the amount on line 10	13		
14 Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13	14		

Part IV Total Losses Allowed

15 Add the income, if any, on lines 1a and 3a and enter the total	15		
16 Total losses allowed from all passive activities for 2004. Add lines 10, 14, and 15. See the instructions to find out how to report the losses on your tax return	16		0.

Caution: The worksheets must be filed with your tax return. Keep a copy for your records.

Worksheet 1 - For Form 8582, Lines 1a, 1b, and 1c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 1					
Total. Enter on Form 8582, lines 1a, 1b, and 1c			-854.		

Worksheet 2 - For Form 8582, Lines 2a and 2b (See instructions.)

Name of activity	(a) Current year deductions (line 2a)	(b) Prior year unallowed deductions (line 2b)	(c) Overall loss
Total. Enter on Form 8582, lines 2a and 2b			

Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 3a, 3b, and 3c					

Worksheet 4 - Use this worksheet if an amount is shown on Form 8582, line 10 or 14 (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Special allowance	(d) Subtract column (c) from column (a)
Total					

Worksheet 5 - Allocation of Unallowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 5				
Total		854.	1.000000000	854.

Fraudulent filed with IRS in late 2008 by Dennis P. and Sylvia Hamilton - No 1041-K-1s-4684s - The Disappearing Trust Trick

Worksheet 6 - Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 6				
Total		854.	854.	

Worksheet 7 - Activities With Losses Reported on Two or More Different Forms or Schedules (See instructions.)

Name of Activity:	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule					
b Net income from form or schedule					
c Subtract line 1b from line 1a. If zero or less, enter -0-					
Total					

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Operating Trust Trick

FORM 1040

PENSIONS AND ANNUITIES

STATEMENT 1

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	106358.	
NONTAXABLE AMOUNT	102092.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		4266.

DEFENSE FINANCE

AMOUNT RECEIVED THIS YEAR	24564.	
NONTAXABLE AMOUNT		
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		24564.

EMPLOYEES RETIREMENT SYSTEM

AMOUNT RECEIVED THIS YEAR	11350.	
NONTAXABLE AMOUNT	570.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		10780.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	33669.	
NONTAXABLE AMOUNT	30000.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		3669.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	102151.	
NONTAXABLE AMOUNT	98152.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		3999.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	51805.	
NONTAXABLE AMOUNT	50000.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		1805.

Fraudulent filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ST. OF TEXAS DEFERRED COMP.

AMOUNT RECEIVED THIS YEAR	4117.	
NONTAXABLE AMOUNT		
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		4117.

EMPLOYEES RETIREMENT SYSTEM OF TEXAS

AMOUNT RECEIVED THIS YEAR	5000	
NONTAXABLE AMOUNT		
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		5000.

US MILITARY RETIREMENT PAY

AMOUNT RECEIVED THIS YEAR	819.	
NONTAXABLE AMOUNT		
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		819.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	120879.	
NONTAXABLE AMOUNT	96754.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		24125.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	73722.	
NONTAXABLE AMOUNT	70000.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		3722.

UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR	97481.	
NONTAXABLE AMOUNT	90000.	
CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D		7481.

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UNITED OF OMAHA

AMOUNT RECEIVED THIS YEAR
 NONTAXABLE AMOUNT
 CAPITAL GAIN DISTRIBUTION REPORTED ON SCH D

97481.
 90000.

7481.

TOTAL INCLUDED IN FORM 1040, LINE 16B

101828.

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

FORM 1040 IRA DISTRIBUTIONS STATEMENT 3

NAME OF PAYER	GROSS DISTRIBUTION	TAXABLE AMOUNT
UNITED OF OMAHA	60006.	60006.
TOTAL TO FORM 1040, LINE 15	60006.	60006.

FORM 1040 FEDERAL INCOME TAX WITHHELD STATEMENT 4

T S DESCRIPTION	AMOUNT
T DEFENSE FINANCE	3245.
S UNITED OF OMAHA	356.
S EMPLOYEES RETIREMENT SYSTEM OF TEXAS	937.
TOTAL TO FORM 1040, LINE 63	4538.

FORM 1040 LATE PAYMENT INTEREST STATEMENT 5

DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	04/15/05	15882.	15882.	.0600	168	445.
INTEREST RATE CHANGE	09/30/05	0.	16327.	.0700	15	47.
LATE FILING PENALTY	10/15/05	3573.	19947.	.0700	1052	4459.
DATE FILED	09/01/08		24406.			
TOTAL LATE PAYMENT INTEREST						4951.

FORM 1040 LATE PAYMENT PENALTY STATEMENT 6

DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	04/15/05	15882.	15882.	41	3256.
DATE FILED	09/01/08				
TOTAL LATE PAYMENT PENALTY					3256.

Fraudulent-filed with IRS in late 2008 by Danny Davila and Silvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

FORM 4835	OTHER INCOME	STATEMENT 7
DESCRIPTION		AMOUNT
RENTS		570.
TOTAL TO FORM 4835, PART I, LINE 6		570.

FORM 8582	ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1		STATEMENT 8	
NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS
	NET INCOME	NET LOSS		GAIN LOSS
ALFRED HAMILTON (DEC. 04/08/04)	0.	-854.		-854.
TOTALS	0.	-854.		-854.

FORM 8582	ALLOCATION OF UNALLOWED LOSSES - WORKSHEET 5		STATEMENT 9	
NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
ALFRED HAMILTON (DEC. 04/08/04)	FORM 4835	854.	1.000000000	854.
TOTALS		854.	1.000000000	854.

FORM 8582	ALLOWED LOSSES - WORKSHEET 6		STATEMENT 10	
NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
ALFRED HAMILTON (DEC. 04/08/04)	FORM 4835	854.	854.	
TOTALS		854.	854.	

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K is 4684s - The Disappearing Trust Trick

FORM 8582

SUMMARY OF PASSIVE ACTIVITIES

STATEMENT 11

R R E A NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
X ALFRED HAMILTON (DEC. 04/08/04)	FORM 4835	-854.		-854.	854.	
TOTALS		-854.		-854.	854.	
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME						
TOTAL TO FORM 8582, LINE 16						

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

FORM 8582

MODIFIED AGI

STATEMENT 12

INCOME

WAGES, SALARIES, TIPS ETC.

DIVIDEND INCOME

TAXABLE REFUNDS

ALIMONY RECEIVED

TAXABLE IRA DISTRIBUTIONS

60006.

TAXABLE PENSIONS AND ANNUITIES

101828.

UNEMPLOYMENT COMPENSATION

OTHER INCOME

INTEREST INCOME

ADD: SERIES EE EXCLUSION

2443.

2443.

BUSINESS INCOME OR LOSS

ADD: PASSIVE LOSSES

SUBTRACT: PASSIVE INCOME

SALE OF ASSETS

ADD: PASSIVE/RREA PROFESSIONAL LOSSES

SUBTRACT: PASSIVE INCOME

RENTAL, ROYALTY OR PASSTHROUGH INCOME OR LOSS

ADD: PASSIVE/RREA PROFESSIONAL LOSSES

SUBTRACT: PASSIVE INCOME

FARM OR FARM RENTAL INCOME OR LOSS

ADD: PASSIVE/RREA PROFESSIONAL LOSSES

SUBTRACT: PASSIVE INCOME

TOTAL INCOME

164277.

ADJUSTMENTS

MOVING EXPENSES

SELF-EMPLOYED HEALTH INSURANCE DEDUCTION

PENALTY ON EARLY WITHDRAWAL OF SAVINGS

ALIMONY PAID

KEOGH/SEP DEDUCTION

OTHER ADJUSTMENTS

TOTAL ADJUSTMENTS

TOTAL TO FORM 8582, LINE 7

164277.

Foundemental withers in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

PAYER'S name, street address, city, state, ZIP code, and telephone no.

YOAKUM NATIONAL BANK
301 W GRAND AVE
P O BOX 777
YOAKUM, TX 77995
(361) 293-5225

RECIPIENT'S name, address and ZIP code

MAURINE P HAMILTON
POD SYLVIA L HAMILTON
9008 EAST DRIVE
AUSTIN TX 78753-5112

Form 1099-INT	5 Investment Expenses	6 Foreign tax paid	7 Foreign country or U.S. possession
---------------	-----------------------	--------------------	--------------------------------------

CALENDAR YEAR 2004	CORRECTED (if checked) <input type="checkbox"/>	OMB No. 1545-0112 Interest Income Copy B For Recipient (Keep for your records.) Form 1099-INT
PAYER'S Federal Identification number 74-0997077	3 Interest on U.S. Savings Bonds and Treas. obligations	4 Federal income tax withheld
RECIPIENT'S identification number 459-20-2593		
Account Number 1617836 DDA	1 Interest income not included in box 3 9.81	2 Early withdrawal penalty
\$ TOTALS ▶		9.81

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction will be imposed on you if this income is taxable and the IRS determines that it has not been reported. Department of the Treasury - Internal Revenue Service

LJB

PAYER'S name, street address, city, state, ZIP code, and telephone no.

YOAKUM NATIONAL BANK
301 W GRAND AVE
P O BOX 777
YOAKUM, TX 77995
(361) 293-5225

RECIPIENT'S name, address and ZIP code

ALFRED HAMILTON OR MAURINE HAM
OR ALAN LYLE HAMILTON, REV LIV
9008 EAST DRIVE
AUSTIN TX 78753-5112

Form 1099-INT	5 Investment Expenses	6 Foreign tax paid	7 Foreign country or U.S. possession
---------------	-----------------------	--------------------	--------------------------------------

CALENDAR YEAR 2004	CORRECTED (if checked) <input type="checkbox"/>	OMB No. 1545-0112 Interest Income Copy B For Recipient (Keep for your records.) Form 1099-INT
PAYER'S Federal Identification number 74-0997077	3 Interest on U.S. Savings Bonds and Treas. obligations	4 Federal income tax withheld
RECIPIENT'S identification number 458-24-4617		
Account Number 1617513 DDA	1 Interest income not included in box 3 310.43	2 Early withdrawal penalty
\$ TOTALS ▶		310.43

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction will be imposed on you if this income is taxable and the IRS determines that it has not been reported. Department of the Treasury - Internal Revenue Service

LJB

Fraudulent-filed with IRS in late 2003 by Danny Davis and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Employees Retirement System of Texas P. O. Box 13207 AustinTX 78711		1. Gross distribution \$ 5,000.00 2a. Taxable amount \$ 5,000.00	OMB No 1545-0119 2004 Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 746000098	RECIPIENT'S identification number 459-20-2593	2b Taxable amount not determined <input type="checkbox"/> Total distribution <input checked="" type="checkbox"/>	3 Capital Gain (included in box 2a) \$ 4 Federal Income Tax withheld \$ 936.71	
RECIPIENT'S name, street address, city, state, and ZIP code Maurine Hamilton 9008 East Dr Austin, TX 78753		5 Employee Contributions \$	6 Net unrealized appreciation in employer's securities \$	This information is being furnished to the Internal Revenue Service.
Account number (optional) 45824461745920259301		7 Distribution code 4	8 Other \$	
		9a Your percentage of total distribution %	9b Total employee contributions \$	15 Local distribution - \$ \$
		10 State Tax withheld - \$ \$	11 State/Payer's state no. -----	
		13 Local Tax withheld - \$ \$		

Form 1099-R

(Keep for your records)

Department of the Treasury - Internal Revenue Service

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 7041-KIS-4684s - The Disappearing Trust Trust

Instructions for Recipient (Continued)

Box 4. This is the amount of Federal income tax withheld. **Include this on your income tax return as tax withheld, and if box 4 shows an amount (other than zero), attach Copy B to your return.** Generally, if you will receive payments next year that are not eligible rollover distributions, you can change your withholding or elect not to have income tax withheld by giving the payer **Form W-4P**, Withholding Certificate for Pension or Annuity Payments.

Box 5. Generally, this shows the employee's investment in the contract (after-tax contributions), if any, recovered tax free this year; the part of premiums paid on commercial annuities or insurance contracts recovered tax free; or the nontaxable part of a charitable gift annuity. This box does not show any IRA contributions.

Box 6. If you received a lump-sum distribution from a qualified plan that includes securities of the employer's company, the net unrealized appreciation (NUA) (any increase in value of such securities while in the trust) is taxed only when you sell the securities unless you choose to include it in your gross income this year. See Pub 575 and the Instructions for Form 4972. If you did not receive a lump-sum distribution, the amount shown is the NUA attributable to employee contributions, which is not taxed until you sell the securities.

Box 7. The following codes identify the distribution you received.

- 1-** Early distribution, no known exception (in most cases, under age 59 1/2). See the Form 1040/1040A instructions and **Form 5329**, Additional Taxes on Qualified Plans (including IRAs) and Other Tax-Favored Accounts. For a rollover to a traditional IRA of the entire taxable part of the distribution, do not file Form 5329. See the Form 1040/1040A instructions.
- 2-** Early distribution, exception applies (under age 59 1/2)*.
- 3-** Disability*.
- 4-** Death*.
- 5-** Prohibited transaction.
- 6-** Section 1035 exchange (a tax-free exchange of life insurance, annuity, or endowment contracts).
- 7-** Normal distribution.
- 8-** Excess contributions plus earnings/excess deferrals (and/or earnings) taxable in 2004.
- 9-** Cost of current life insurance protection (premiums paid by a trustee or custodian for current insurance protection, taxable to you currently).
- A-** May be eligible for 10-year tax option. See Form 4972.
- D-** Excess contributions plus earnings/excess deferrals taxable in 2002.
- E-** Excess annual additions under section 415 and certain excess amounts under section 403(b) plans. Report on Form 1040/1040A on the line for taxable pension or annuity income*.

- F-** Charitable gift annuity.
- G-** Direct rollover to a qualified plan, a tax-sheltered annuity, a governmental 457(b) plan, or an IRA. May also include a transfer from a conduit IRA to a qualified plan*.
- J-** Early distribution from a Roth IRA, no known exception (in most cases, under age 59 1/2). Report on Forms 1040 and 8606 and see Form 5329.
- L-** Loans treated as distributions.
- N-** Recharacterized IRA contribution made for 2004 and recharacterized in 2004. Report on 2004 Form 1040/1040A and Form 8606, if applicable.
- P-** Excess contributions plus earnings/excess deferrals taxable in 2003.
- Q-** Qualified distribution from a Roth IRA. You are age 59 1/2 or over and meet the 5-year holding period for a Roth IRA. See the Form 1040/1040A instructions*.
- R-** Recharacterized IRA contribution made for 2003 and recharacterized in 2004. Report on 2003 Form 1040/1040A and Form 8606, if applicable.
- S-** Early distribution from a SIMPLE IRA in first 2 years, no known exception (under age 59 1/2). May be subject to an additional 25% tax. See Form 5329.
- T-** Roth IRA distribution, exception applies. You are either age 59 1/2 or over or an exception (code 3 or 4) applies. See the Form 1040/1040A instructions.

If the IRA/SEP/SIMPLE box is checked, you have received a traditional IRA, SEP, or SIMPLE distribution.

Box 8. If you received an annuity contract as part of a distribution, the value of the contract is shown. It is not taxable when you receive it, and should not be included in boxes 1 and 2a. When you receive periodic payments from the annuity contract, they are taxable at that time. If the distribution is made to more than one person, the percentage of the annuity contract distributed to you is also shown. You will need this information if you use the special 10-year tax option (Form 4972).

Box 9a. If a total distribution was made to more than one person, the percentage you received is shown.

Box 9b. For a life annuity from a qualified plan or from a tax-sheltered annuity (with after-tax contributions), an amount may be shown for the employee's total investment in the contract. It is used to compute the taxable part of the distribution. See Pub. 575.

Boxes 10-15. If state or local income tax was withheld from the distribution, these boxes may be completed. Boxes 12 and 15 may show the part of the distribution subject to state and/or local tax.

* You are not required to file Form 5329.

Fraudulent-filed with IRS in late 2008 by Danny Davis and Cynthia Davis
113-4085-138-Danny Davis
113-4085-138-Cynthia Davis
113-4085-138-10941

<p>ACCOUNT NUMBER: UA7728312 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>60,005.98</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>60,005.98</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>356.19</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7 IRA/SEP/SIMP</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	60,005.98	2A. TAXABLE AMOUNT.....	60,005.98	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	356.19	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7 IRA/SEP/SIMP		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <hr/> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
1. GROSS DISTRIBUTION.....	60,005.98																											
2A. TAXABLE AMOUNT.....	60,005.98																											
2B. TOTAL DIST: NO TAX AMT NOT DET: NO																												
3. LINE 2A FOR CAPITAL GAIN...	0.00																											
4. FEDERAL INCOME TAX WITHHELD	356.19																											
5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00																											
6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00																											
7. CATEGORY OF DISTRIBUTION..7 IRA/SEP/SIMP																												
8. OTHER..... %.....	0.00																											
9A. YOUR % OF TOTAL DISTRIBUTION	0%																											
9B. TOTAL EMPLOYEE CONTR.....	0.00																											
10. STATE INCOME TAX WITHHELD.	0.00																											
11. PAYER'S STATE NUMBER...																												

<p>ACCOUNT NUMBER: UA7728312 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>60,005.98</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>60,005.98</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>356.19</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7 IRA/SEP/SIMP</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	60,005.98	2A. TAXABLE AMOUNT.....	60,005.98	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	356.19	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7 IRA/SEP/SIMP		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <hr/> <p>COPY B</p> <p>REPORT THIS INCOME ON YOUR FEDERAL TAX RETURN. IF THIS FORM SHOWS FEDERAL INCOME TAX WITHHELD IN BOX 4, ATTACH THIS COPY TO YOUR RETURN.</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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Fraudulent-filed with IRS in late 2018 by Danny Davila and Sylvia Hamilton - No 1041-K1s-46846 - The Disappearing Trust IRAs

ACCOUNT NUMBER:

UA7728312 7

1 CPUAR

000880

HAMILTON MAURINE P
9008 EAST DR
AUSTIN

TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY, THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCISE TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

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BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR; THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE; OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS.); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329.); 3-DISABILITY (YOU NEED NOT FILE FORM 5329.); 4-DEATH (YOU NEED NOT FILE FORM 5329.); 5-PROHIBITED TRANSACTIONS; 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION TAXABLE TO YOU CURRENTLY. A MAY BE ELIGIBLE FOR 40 YEAR TAX

Fraudulent-filed with IRS in 2008 by Sybil Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER:

UA7728312 7

1 CPUAR

000880

HAMILTON MAURINE P
9008 EAST DR
AUSTIN

TX 78753-5112

Instructions for Recipient

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Fraudulent-filed with IRS in 2008 by Sybil Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

08/03/04

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Defense Finance and Accounting Service US MILITARY RETIREMENT PAY PO BOX 7130 LONDON KY 40742-7130		1 Gross distribution \$ 24564.00	OMB No. 1545-0119 2004	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		2a Taxable amount \$ 24564.00		
PAYER'S Federal identification number 34-0727612	RECIPIENT'S identification number 458-24-4617	2b Total distribution <input type="checkbox"/>	DECEASED	
RECIPIENT'S name, address and ZIP code ALFRED HAMILTON 580 CO RD 329 YOAKUM TX 77995-6449		4 Federal income tax withheld \$ 3245.20	7 Distribution code 7	
		9 Your percentage of total distribution _____ %		
		10 State income tax withheld \$	11 State/Payer's state number	
		RETIRED 010104-033104		

Form 1099-R

(6-92)

Department of the Treasury-Internal Revenue Service

Cut Here

08/03/04

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Defense Finance and Accounting Service US MILITARY RETIREMENT PAY PO BOX 7130 LONDON KY 40742-7130		1 Gross distribution \$ 24564.00	OMB No. 1545-0119 2004	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
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PAYER'S Federal identification number 34-0727612	RECIPIENT'S identification number 458-24-4617	2b Total distribution <input type="checkbox"/>	DECEASED	
RECIPIENT'S name, address and ZIP code ALFRED HAMILTON 580 CO RD 329 YOAKUM TX 77995-6449		4 Federal income tax withheld \$ 3245.20	7 Distribution code 7	
		9 Your percentage of total distribution _____ %		
		10 State income tax withheld \$	11 State/Payer's state number	
		RETIRED 010104-033104		

Form 1099-R

(6-92)

Department of the Treasury-Internal Revenue Service

302085H

CALL 1-800-269-5170 IF YOU HAVE A QUESTION ABOUT YOUR RETIRED 1099-R

ORIGINAL

Fraudulent-filed with IRS in late 2008 by Danny DeVila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust FRK

Instructions to Recipient

All distributions from military retired pay, pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

Box 1. - Shows the total amount you received this year. For military retired benefits, this amount is the gross benefit, minus non-taxable items such as VA compensation, disability retirement, SBP/RSFP premiums, etc. For annuity recipients, this amount is the gross annuity minus SSA offset and DIC. For beneficiaries, this amount is the unpaid retirement or annuity benefit as described above. For former spouses, this is the distribution of court ordered division of property.

Report the amount printed in **Box 1** of the Form 1099-R on your Form 1040 or 1040A.

Box 2a. - Same as Box 1 above.

Box 2b. - Not used.

Box 4. - This is the amount of Federal income tax withheld on the distribution. **Include this on your income tax return as tax withheld, and attach Copy B to your return.** If you will receive payments next year and you want to increase or decrease your withholding or you want to elect not to have income tax withheld, you must submit a new **Form W-4** (for retirees), or **Form W-4P** (for all annuitants and former spouse payees receiving court-ordered division of property).

Box 7. - The code listed identifies the distribution you received: **3** - Disability (You need not file Form 5329.); **4** - Death (You need not file Form 5329.); or, **7** - Normal distribution.

Box 9. - Not used.

Boxes 10 and 11. - If state income tax was withheld from the distribution, these may be completed.

NOTE: Boxes 3,5,6,8,12,13,14 and 15 have been deleted from this form.

Fraudulent-filed with IRS in Dec 2009 by Cynthia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2004

• PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
 • SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name MAURINE P HAMILTON	Box 2. Beneficiary's Social Security Number 459-20-2593
--	---

Box 3. Benefits Paid in 2004 \$18,563.20	Box 4. Benefits Repaid to SSA in 2004 NONE	Box 5. Net Benefits for 2004 (Box 3 minus Box 4) \$18,563.20
--	--	--

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit	\$17,764.00
Medicare premiums deducted from your benefit	\$799.20
Total Additions	\$18,563.20
Benefits for 2004	\$18,563.20

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

NONE

Box 7. Address

MAURINE P HAMILTON
 9008 EAST DRIVE
 AUSTIN TX 78753-5112

Box 8. Claim Number (Use this number if you need to contact SSA.)

459-20-2593A

CU1007529-11B31008233

CU1007529-11B31008233

DO NOT RETURN THIS FORM TO SSA OR IRS

Form SSA-1099-SM (1-2005)

Fraudulent-filed with IRS in late 2008 by Danny Davis and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

Notice 703

(Rev. September 2004)



Department of the Treasury
Internal Revenue Service

Read This To See If Your Social Security Benefits May Be Taxable

If your social security and/or SSI (supplemental security income) benefits were your only source of income for 2004, you probably

will not have to file a federal income tax return.

Fill in lines A through E below to see if any of your benefits may be taxable for 2004.

Note. If you plan to file a joint income tax return, include your spouse's amounts, if any, on lines A, C, and D below.

A Enter the total amount from box 5 of all your Forms SSA-1099 . . .	A _____
B Enter one-half of the amount on line A	B _____
C Enter your total income that is taxable, such as pensions, wages, interest, ordinary dividends, and capital gain distributions. Do not reduce your income by any student loan interest deduction, tuition and fees deduction, the standard deduction (or itemized deductions), or exemptions	C _____
D Enter any tax-exempt interest such as interest on municipal bonds	D _____
E Add lines B, C, and D, and enter the total here. Then, read the information below . . .	E _____

Part of your social security benefits may be taxable if, for 2004, you were:

1. Single, and line E above is more than \$25,000.
2. Married, and
 - a. You would file jointly, and line E above is more than \$32,000; or
 - b. You would file separately, and line E above is more than zero (more than \$25,000 if you

lived apart from your spouse for all of 2004).

If your figures show that part of your benefits may be taxable, see *Social Security Benefits* in your federal income tax return instructions. If they do not, none of your benefits are taxable this year unless you exclude income from sources outside the United States, interest income from series EE or I U.S. savings

bonds issued after 1989, or employer-provided adoption benefits. For more details, see IRS Pub. 915 or contact the IRS as explained below.

Note. If your figures show that part of your benefits may be taxable and you received benefits in 2004 that were for a prior year, see Pub. 915 for rules on a special election you can make that may reduce the amount of your taxable benefits.

Get More Information From the IRS

If you still have questions about whether your social security benefits are taxable, see the 2004 federal income tax return instructions for ways to get help

from the IRS. If you do not have the instructions, you can get your questions answered by:

- Calling the IRS at 1-800-829-1040.

- Sending written tax questions to the IRS. To get the address, call 1-800-829-1040.
- Using TTY/TDD equipment. Call 1-800-829-4059.

Do Not Return This Notice to the SSA or the IRS

Form SSA-1099-SM (1-2005)

See the Social Security Benefit Statement on the Reverse →

Fraudulent-filed with IRS in late 2008 by Tammy Devila and Sylvia Hamilton
The Disappearing Trust Trick

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2004

• PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
• SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name
ALFRED HAMILTON

Box 2. Beneficiary's Social Security Number
458-24-4617

Box 3. Benefits Paid in 2004
\$7,338.40

Box 4. Benefits Repaid to SSA in 2004
NONE

Box 5. Net Benefits for 2004 (Box 3 minus Box 4)
\$7,338.40

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit	\$7,072.00
Medicare premiums deducted from your benefit	\$266.40
Total Additions	\$7,338.40
Benefits for 2004	\$7,338.40

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld
NONE

Box 7. Address
**ALFRED HAMILTON
9902 CHILDRESS DR
AUSTIN TX 78753-4332**

Box 8. Claim Number (Use this number if you need to contact SSA.)
458-24-4617A

CUI007676-11831007980

CUI007676-11831007980

DO NOT RETURN THIS FORM TO SSA OR IRS

Fraudulent-filed with IRS in late 2008 by Danny Devila and Sylvia Hamilton - No 1041-MS-4684s - The Disappearing Trust Trick



Read This To See If Your Social Security Benefits May Be Taxable

If your social security and/or SSI (supplemental security income) benefits were your only source of income for 2004, you probably

will not have to file a federal income tax return.

Fill in lines A through E below to see if any of your benefits may be taxable for 2004.

Note. If you plan to file a joint income tax return, include your spouse's amounts, if any, on lines A, C, and D below.

A Enter the total amount from box 5 of all your Forms SSA-1099	A _____
B Enter one-half of the amount on line A	B _____
C Enter your total income that is taxable, such as pensions, wages, interest, ordinary dividends, and capital gain distributions. Do not reduce your income by any student loan interest deduction, tuition and fees deduction, the standard deduction (or itemized deductions), or exemptions	C _____
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E Add lines B, C, and D, and enter the total here. Then, read the information below	E _____

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Do Not Return This Notice to the SSA or the IRS

Fraudulent-filed with IRS in late 2008 by Danny Devila and Myra Hamilton. No Fault of The Disappearing Trust Trick

Combined Tax Statement for Forms 1098, 1099, 5498 for Tax Year 2004

NAME, ADDRESS AND FEDERAL I.D. NO.
UNITED OF OMAHA LIFE INS. CO.
MUTUAL OF OMAHA PLAZA
OMAHA NE 68175

CUSTOMER NAME, ADDRESS
MAURINE P HAMILTON
9008 EAST DR
AUSTIN TX 78753-5112

1099-DIV - Copy B - For Recipient - OMB # 1545-0111
1099-INT - Copy B - For Recipient - OMB # 1545-0112
1099-MISC - Copy B - For Recipient - OMB # 1545-0115
1099-OLD - Copy B - For Recipient - OMB # 1545-0117
1099-S - Copy B - For Recipient - OMB # 1545-0097
5498 - Copy B - For Participant - OMB # 1545-0747
5498-ESA - Copy B - For Beneficiary - OMB # 1545-1815

TAXPAYER I.D. NO.
459-20-2593

CUSTOMER SERVICE PHONE # 402-351-5180

FEDERAL I.D. NO. 47-0322111 0717 0050

ACCOUNT NUMBER	ACCOUNT TYPE	IRS DESCRIPTION	IRS BOX #	AMOUNT
00500411645	DD	FORM 1099-INT, INTEREST INCOME	** *	
		INTEREST INCOME 1		51.92

For Form 1099-B, DIV, INT, MISC, OLD, and Q: This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
* Form 1099 OID: This may not be the correct figure to report on your income tax return. See instructions below.
* Form 1098 - Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.

1099 - MISC - OMB # 1545-0115

Amounts shown may be subject to self-employment (SE) tax. If your net income from self-employment is \$400 or more, you must file a return and compute your SE tax on Schedule SE (Form 1040). See Pub. 533, Self-Employment Tax, for more information. If no income or social security and Medicare taxes were withheld and you are still receiving these payments, see Form 1040-ES, Estimated Tax for Individuals.
Individuals must report as explained below. Corporations, fiduciaries, or partnerships report the amounts on the proper line of your tax return.
Box 1 and 2. Report rents from real estate on Schedule E (Form 1040). If you provided significant services to the tenant, sold real estate as a business, or rented personal property as a business, report on Schedule C or C-EZ (Form 1040). For royalties on timber, coal, and iron ore, see Pub. 544, Sales and Other Dispositions of Assets.
Box 3. Generally, report this amount on the "Other Income" line of Form 1040 and identify the payment. The amount shown may be payments received as the beneficiary of a deceased employee, prizes, awards, taxable damages, Indian gaming profits, or other taxable income. If it is trade or business income, report this amount on Schedule C, C-EZ, or F (Form 1040).
Box 4. Shows backup withholding or withholding on Indian gaming profits. Generally, a payer must backup withhold at a 28% rate if you did not furnish a taxpayer identification number. See Form W-9, Request for Taxpayer Identification Number and Certification, for more information. Report this amount on the "Other Income" line of Form 1040.
Box 5. An amount in this box means the fishing boat operator considers you self-employed. Report this amount on Schedule C or C-EZ (Form 1040).
Box 6. Report on Schedule C or C-EZ (Form 1040).
Box 7. Shows nonemployee compensation. If you are in the trade or business of catching fish, box 7 may show cash you received for the sale of fish. If payments in this box are SE income, report this amount on Schedule C, C-EZ, or F (Form 1040), and complete Schedule SE (Form 1040). You received this form instead of Form W-2 because the payer did not consider you an employee and did not withhold income tax or social security and Medicare taxes. Contact the payer if you believe this form is incorrect or has been issued in error. If you believe you are an employee, report this amount on line 7 of Form 1040 and call the IRS for information on how to report any social security and Medicare taxes.
Box 8. Shows substitute payments in lieu of dividends or tax-exempt interest received by your broker on your behalf as a result of a sale of your securities. Report on the "Other Income" line of Form 1040.
Box 9. If checked, \$5,000 or more of sales of consumer products was paid to you on a buy-sell, deposit-commission, or other basis. A dollar amount does not have to be shown. Generally, report any income from your sale of these products on Schedule C or C-EZ (Form 1040).
Box 10. Report this amount on line 3 of Schedule F (Form 1040).
Box 13. Shows your total compensation of excess golden parachute payments subject to a 20% excise tax. See the Form 1040 instructions for the "Total Tax" line.
Box 14. Shows gross proceeds paid to an attorney in connection with legal services. Report only the taxable part as income on your return.
Box 15. Other information may be provided to you in box 15.
Boxes 16-18. Shows state or local income tax withheld from the payments.

1099 - DIV - OMB # 1545-0110

Box 1a. Shows total ordinary dividends that are taxable. Include this amount on line 9a of Form 1040 or 1040-EZ. Also, report it on Schedule B (Form 1040) or Schedule 1 (Form 1040A), if required.
The amount shown may be a distribution from an employee stock ownership plan (ESOP). Report the dividend on your Form 1040/1040A but treat it as a plan distribution, not as investment income, for any other purpose.
Box 1b. Shows the portion of the amount in box 1a that may be eligible for the 15% or 5% capital gains rates. See the Form 1040/1040A instructions for how to determine this amount. Report the eligible amount on line 9b, Form 1040 or 1040A.
Box 2a. Shows total capital gain distributions (long-term) from a regulated investment company, real estate investment trust. Report the amounts shown in box 2a on Schedule D (Form 1040), line 13. But if the amount is shown in boxes 2c-2d and only capital gains and losses are capital gain distributions, you may be able to report the distributions shown in box 2a on line 13 of Form 1040 (line 10 of Form 1040A) rather than Schedule D. See the Form 1040/1040A instructions.
Box 2b. Shows the portion of the amount in box 2a that is unrecaptured section 1250 gain from certain depreciable real property. Report this amount on the Unrecaptured Section 1250 Gain Worksheet in the Schedule D instructions (Form 1040).
Box 2c. Shows the portion of the amount in box 2a that is section 1202 gain from certain small business stock that may be subject to a 50% exclusion. See the Schedule D (Form 1040) instructions.
Box 2d. Shows 28% rate gain from sale or exchanges of collectibles. Use this amount when completing the 28% Rate Gain Worksheet-Line 18 in the instructions for Schedule D (Form 1040).
Box 3. Shows the part of the distribution that is nontaxable because it is a return of your cost (or other basis). You must reduce your cost (or other basis) by this amount for figuring profit or loss when you sell the stock. But if the amount is shown in boxes 2c-2d and only capital gains and losses are capital gain distributions, even though this form shows them as nontaxable. See Pub. 550, Investment Income and Expenses.
Box 4. Shows backup withholding. For example, a payer must backup withhold on certain payments at a 28% rate if you did not give your taxpayer identification number to the payer. See Form W-9, Request for Taxpayer Identification Number and Certification, for information on backup withholding. Include this amount on your income tax return as tax withheld.
Box 5. Shows your share of expenses of a nonpublicly offered related investment company, generally a nonpublicly offered mutual fund. If you file Form 1040, you may deduct these expenses on the "Other Expenses" line of Form 1040 subject to the 2% limit. This amount is included in box 1a.
Box 6. Shows the foreign tax you may be able to claim as a deduction or a credit on your Form 1040. See the Form 1040 instructions.
Boxes 9 and 8. Shows cash and noncash liquidation distributions.
Nonresidents. If this form includes amounts belonging to another person, you are considered a nominee recipient. You must file Form 1099-DIV with the IRS for each of the other owners to show their shares of the interest. If you must furnish a Form 1099-DIV to each, a husband or wife is not required to file a nominee return to show amounts owned by the other. See the 2004 General Instructions for Forms 1099, 1098, 5498, and W-2G.

1099 - INT - OMB # 1545-0112

Box 1. Shows interest paid to you during the calendar year by the payer. This does not include interest shown in box 3.
If you receive a Form 1099-INT for interest paid on a tax-exempt obligation, see the instructions for your income tax return.
Box 2. Shows interest or principal foregone because of early withdrawal of time savings. You may deduct this amount to figure your adjusted gross income on your income tax return. See the instructions for Form 1040 to see where to take the deduction.
Box 3. Shows interest on U.S. savings bonds, Treasury bonds, and Treasury notes. This may or may not be taxable. See Pub. 550, Investment Income and Expenses. This interest is exempt from state and local income taxes. This interest is not included in box 1.
Box 4. Shows backup withholding. Generally, a payer must backup withhold at a 28% rate if you did not furnish your taxpayer identification number (TIN) or you did not furnish the correct TIN to the payer. See Form W-9, Request for Taxpayer Identification Number and Certification, for information on backup withholding. Include this amount on your income tax return as tax withheld.
Box 5. Any amount shown is your share of investment expenses of a single-class REMIC. If you file Form 1040, you may deduct these expenses on the "Other Expenses" line of Schedule A (Form 1040) subject to the 2% limit. This amount is included in box 1.
Box 6. Shows foreign tax you may be able to claim this tax as a deduction or a credit on your Form 1040. See your Form 1040 instructions.
Nonresidents. If this form includes amounts belonging to another person(s), you are considered a nominee recipient. Complete a Form 1099-INT for each of the other owners showing the income allocable to each. File Copy A of the form with the IRS. Furnish Copy B to each owner. List yourself as the "payer" and the other owner(s) as the "recipient." File Form(s) 1099-INT with Form 1096, Annual Summary and Transmittal of U.S. Information Returns, with the Internal Revenue Service Center for your area. On Form 1096 list yourself as the "filer." A husband or wife is not required to file a nominee return to show amounts owned by the other.

1099 - O - OMB # 1545-1760

Box 1. Shows the gross distribution (including in-kind distributions) paid to you this year from a qualified tuition program (section 529) or a Coverdell ESA (section 529). This amount is the total of the amounts shown in box 2 and box 3. See Pub. 970 for more information.
Caution: Coverdell ESA distributions (other than earnings on excess contributions) made during 2004: the payor/trustee is not required to report amounts in boxes 2 and 3. Instead, the payor/trustee may report the fair market value of the Coverdell ESA as of December 31, 2004, in the blank box below boxes 5 and 6. Figure your earnings and basis, use the Coverdell ESA-Taxable Withdrawals and Basis worksheet in Pub. 970.
Box 2. Shows the earnings part of the gross distribution shown in box 1. Generally, amounts distributed are included in income unless they are used to pay qualified education expenses, transferred between trustees, or rolled over to another qualified education program within 60 days. Report amounts included in income on the "Other Income" line of Form 1040.
Under a qualified tuition program, the amount in box 2 is included in income if there has been (a) more than one transfer or rollover within any 12-month period with respect to the same beneficiary, or (b) a change in the designated beneficiary and the new designated beneficiary is not a family member. Under a Coverdell ESA, the amount in box 2 is included in income if there has been a change in the designated beneficiary and the new designated beneficiary is not a family member or is over age 30 (except for beneficiaries with special needs).
Also, an additional 10% tax may apply to part or all of any amount included in income from the Coverdell ESA or qualified tuition program. See Form 5329, Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts, and your tax return instructions for information about how to report any income.
If a final (total) distribution is made from your account and you have not recovered your contributions, you may have a deductible loss. Claim any loss on the "Other Expenses" line of Schedule A (Form 1040), Itemized Deductions.
Box 3. Shows your basis in the gross distribution reported in box 1.
Box 4. This box is checked if you transferred the amount in box 1 from one education program to another education program in a trustee-to-trustee transfer. However, this box may not be checked if the transfer was made from a Coverdell ESA.
Box 5. Shows whether the gross distribution was from a qualified tuition program (private or state) or from a Coverdell ESA.
Distribution codes. For 2004, the payer/trustee may, but is not required to, report (in the box below boxes 5 and 6) one of the following codes to identify the distribution you received: 1—Distributions (including transfers); 2—Excess contributions plus earnings taxable in 2004; 3—Excess contributions plus earnings taxable in 2003; 4—Disability; 5—Death; 6—Prohibited transaction.

1098 - E - OMB # 1545-1576

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for student loan interest.
A person (including a financial institution, a governmental unit, and an educational institution) that receives interest payments of \$600 or more during the year on one or more qualified student loans must furnish this statement to you.
You may be able to deduct student loan interest that you actually paid in 2004 on your income tax return. If your student loan was made before September 1, 2004, you may be able to deduct additional amounts, such as loan origination fees and capitalized interest, not reported on this statement. However, you may not be able to deduct the full amount of interest reported on this statement. Do not contact the recipient/lender for explanations of the requirements for (and how to figure) any allowable deduction for the interest paid. Instead, for more information see Pub. 970, Tax Benefits for Education, and "Student Loan Interest Deduction Worksheet" in your Form 1040 or 1040A instructions.
Box 1. Shows the interest reduced by the lender during the year on one or more student loans made to you.
Box 2. Shows if loan origination fees and/or capitalized interest are included in box 1.
Brokers and barter exchanges must report proceeds from transactions to you and the IRS on Form 1099-B by January 31 of the year following the calendar year of the transaction. Reporting is also required when your broker knows or has reason to know that a corporation in which you own stock has had a change in control or a substantial change in capital structure. You may be required to recognize gain from the receipt of cash, stock, or other property that was exchanged for the corporation's stock. If your broker reported this type of transaction to you, the corporation is identified in the box below your name and address on Form 1099-B.
Box 13. Shows the trade date of the transaction. For aggregate reporting, no entry will be present.
Box 1b. For broker transactions, may show the CUSIP (Committee on Uniform Security Identification Procedures) number of the item reported.
Box 2. Shows the aggregate proceeds from transactions involving stocks, bonds, other debt obligations, commodities, or forward contracts. Losses on forward contracts and changes in control or substantial change in capital structure are shown in parentheses. This box does not include proceeds from regulated futures contracts. The broker must indicate whether gross proceeds or gross proceeds less commissions and option premiums were reported to the IRS. Report this amount on Schedule D (Form 1040), Capital Gains and Losses. However, if box 12 is checked, you cannot take a loss on your tax return based on gross proceeds from an acquisition of control or substantial change in capital structure reported in Box 2. Do not report this loss on Schedule D (Form 1040). The broker should advise you of any losses on a separate statement.
Box 3. Shows the cash you received, the fair market value of any property or services you received, and/or the fair market value of any trade credits or scrip received to your account by a barter exchange. See Pub. 528, Taxable and Nontaxable Income, for information on how to report this amount.
Box 4. Shows backup withholding. Generally, a payer must backup withhold at a 28% rate if you did not furnish your taxpayer identification number to the payer. See Form W-9, Request for Taxpayer Identification Number and Certification, for information on backup withholding. Include this amount on your income tax return as tax withheld.
Box 5. Shows the number of shares of the corporation's stock that you held which were exchanged in the change in control or substantial change in capital structure.
Box 6. Shows the class or classes of the corporation's stock that were exchanged in the change in control or substantial change in capital structure.
Box 7. Shows a brief description of the item or service for which the proceeds or bartering income is being reported. For regulated futures contracts and forward contracts, "RFC" or other appropriate description may be shown.
Regulated Futures Contracts:
Box 8. Shows the profit or (loss) realized on regulated futures or foreign currency contracts closed during 2004.
Box 9. Shows any year-end adjustment to the profit or (loss) shown in box 8 due to open contracts on December 31, 2003.
Box 10. Shows the unrealized profit or (loss) on open contracts held in your account on December 31, 2004. These are considered sold as of that date. This will become an adjustment reported in box 9 in 2005.
Box 11. Boxes 9 and 10 are all used to figure the aggregate profit or (loss) on regulated futures or foreign currency contracts for the year. Include this amount on your 2004 Form 6781.

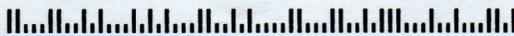
5498-ESA - OMB # 1545-1815

The information in boxes 1 and 2 is being furnished to the Internal Revenue Service.
The information on Form 5498-ESA is furnished to you by the trustee or issuer of your Coverdell education savings account (ESA) by May 2, 2005. Form 5498-ESA reports contributions and rollover contributions made for you for 2004. For more information about Coverdell ESAs, see Pub. 970, Tax Benefits for Education.
Box 1. Shows Coverdell ESA contributions made in 2004 and through April 15, 2005 on your behalf. Do not deduct these amounts on your income tax return. If the total contributions made to all your Coverdell ESAs for 2004 exceeded \$2,000, you must rollover the excess, plus earnings, by May 31, or you may owe a penalty. You must keep track of your Coverdell ESA basis (contributions and distributions).
Box 2. Shows any rollover, including a direct rollover, you made in 2004. Generally, any amount rolled over from one Coverdell ESA to another Coverdell ESA for the benefit of the named beneficiary or a member of the beneficiary's family who is under age 30 (except for a beneficiary with special needs) is not taxable. (Continued on back of Statement) Note: See back of tax statement for additional instructions

This information is not to be disseminated - No 1041-K-1s-4684s - The Disappearing Trust Trick

Important Tax Return Document Enclosed

0178360 01 AT 0.292 **AUTO T6 2 0195 78753-511208



MAURINE P HAMILTON
9008 EAST DR
AUSTIN TX 78753-5112

Maurine P Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

1099-OID - OMB # 1545-0117

The information in Form 1099-OID is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this information is not reported and the IRS determines that it has not been reported.

Original issue discount (OID) is the excess of an obligation's stated redemption price at maturity over its issue price (acquisition price for a stripped bond or coupon). OID is taxable as interest over the life of the obligation. If you are the holder of an OID obligation, you must include an amount of OID in your gross income each year during the obligation. Obligations that may have OID include a bond, debenture, note, certificate, or other evidence of indebtedness having a term of more than 1 year. For example, the OID rules may apply to certificates of deposit (CDs), time deposits, bonus savings plans, and other deposit arrangements, especially if the payment of interest is deferred until maturity. In addition, the OID rules apply to Treasury inflation-indexed securities. See **Pub. 550**, Investment Income and Expenses, for more information.

If as the record holder, you receive Form 1099-OID showing amounts belonging to another person, you are considered a **nominee** recipient. Complete a Form 1099-OID for each of the other owners showing the amounts allocable to each. File Copy A of the form with the IRS. Furnish Copy B to each owner. List yourself as the "payer" and the other owner as the "recipient." File Form(s) 1099-OID with Form 1096, Annual Summary and Transmittal of U.S. Information Returns, with the Internal Revenue Service Center for your area, on Form 1096, list yourself as the "filer." A husband or wife is not required to file a nominee return to show amounts owned by the other. If you bought or sold an obligation during the year and you are not a nominee, you are not required to issue or file Form 1099-OID showing the OID or stated interest allocable to the seller/buyer of the obligation.

Box 1. Shows the OID on the obligation for the part of the year you owned it. Report the amount in box 1 as interest income on your income tax return. However, depending on the type of debt instrument, the issue or acquisition date, and other factors (for example, if you paid acquisition or bond premium, or the obligation is a stripped bond or coupon), you may have to figure the correct amount of OID to report on your return. See **Pub. 1212**, List of Original Issue Discounts.

Box 2. Shows other interest on this obligation for the year, which is an amount separate from the OID. If you held the obligation the entire year, report this amount as interest income on your tax return. If you disposed of the obligation or acquired it from another holder during the year, see **Pub. 550** for reporting instructions. If there is an amount in both boxes 2 and 6, tax interest on a U.S. Treasury obligation and is exempt from state and local income taxes.

Box 3. Shows interest or principal forfeited if you withdrew the money before the maturity date of the obligation, such as from a CD. You may deduct the amount to figure your adjusted gross income on your income tax return. See the instructions for Form 1040 to see where to take the deduction.

Box 4. Shows backup withholding. Generally, a payer must backup withhold at a 28% rate if you did not furnish your taxpayer identification number (TIN) or you did not furnish the correct TIN to the payer. See **Form W-9**, Request for Taxpayer Identification Number and Certification, for information on backup withholding. **Include this amount on your income tax return as tax withheld.**

Box 5. Shows the identification number (CUSIP number) or description of the obligation. The description may include the stock exchange, issuer, coupon rate, and year of maturity.

Box 6. Shows OID on a U.S. Treasury obligation for the part of the year you owned it. Report this amount as interest income on your federal income tax return, and see **Pub. 1212** to figure any appropriate adjustments to this amount. This OID is exempt from state and local income taxes and is not included in box 1.

Box 7. Any amount shown is your share of investment expenses of a single-class REMIC. If you file Form 1040, you may deduct these expenses on the "Other expenses" line of **Schedule A (Form 1040)** subject to the 2% limit. This amount is included in box 2.

1099-A - OMB # 1545-0877

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this information is not reported and the IRS determines that it has not been reported.

Certain lenders who acquire an interest in property that was security for a loan or who have reason to know that the property has been abandoned must provide you with this statement. You may have reportable income or loss because of such acquisition or abandonment of property. For information about foreclosures and abandonments, see **Pub. 544**, Sales and Other Dispositions of Assets. Information about foreclosures and abandonments is measured by the difference between your adjusted basis in the property and the amount of your debt canceled in exchange for the property, or, if greater, the sale proceeds. If you abandoned the property, you may have income from the discharge of indebtedness in the amount of the unpaid balance of your canceled debt. You also may have a loss from abandonment up to the adjusted basis of the property at the time of abandonment. Losses on acquisitions or abandonments of property held for personal use are not deductible. See **Pub. 544**, Sales and Other Dispositions of Assets.

Property means any real property (such as a personal residence), any intangible property, and any personal property that is held for investment or used in a trade or business.

If you borrowed money on this property with someone else, each of you should receive this statement.

Box 1. For a lender's acquisition of property that was security for a loan, the date shown is generally the earlier of the date title was transferred to the lender or the date possession and the burdens and benefits of ownership were transferred to the lender. It may be the date of a foreclosure or execution sale or the date your right of redemption or objection expired. For an abandonment, the date shown is the date on which the lender first knew or had reason to know that the property was abandoned or the date of a foreclosure, execution, or similar sale.

Box 2. Shows the debt (principal only) owed to the lender on the loan when the interest in the property was acquired by the lender or on the date the lender first knew or had reason to know that the property was abandoned.

Box 3. Shows the fair market value of the property. If the amount in box 4 is less than the amount in box 2, and your debt is canceled, you may have cancellation of debt income.

Box 5. Shows whether you were personally liable for repayment of the loan when the debt was created or, if modified, when it was last modified.

Box 6. Shows the description of the property acquired by the lender or abandoned. If "ODC" is shown, the form indicates the amount of any Commodity Credit Corporation loan outstanding when you forfeited your commodity.

5498 - OMB # 1545-0747

This information is being furnished to the Internal Revenue Service.

The information on Form 5498 is submitted to the Internal Revenue Service by the trustee or issuer of your individual retirement arrangement (IRA) to report contributions, including any catch-up contributions, and the fair market value of the account. For information about IRAs, see **Pub. 590**, Individual Retirement Arrangements (IRAs), and **Pub. 560**, Retirement Plans for Self-Employed (SEP, SIMPLE, and Qualified Plans).

Box 1. Shows traditional IRA contributions for 2004 you made in 2004 and through April 15, 2005. These contributions may be deductible on your Form 1040 or 1040A. However, if you or your spouse was an active participant in an employer's pension plan, these contributions may not be deductible. This box does not include amounts in boxes 2-4 and 6-10.

Box 2. Shows any rollover, including a direct rollover, of a traditional IRA, you made in 2004. It does not show any amounts you converted from your traditional IRA, SEP IRA, or SIMPLE IRA to a Roth IRA. They are shown in box 3. See the Form 1040 or 1040A instructions for information on how to report rollovers. If you have ever made any nondeductible contributions to your traditional IRA or SEP IRA and you did not roll over the total distribution, see **Form 8606**, Nondeductible IRAs, to figure the taxable amount. If a rollover was rolled over, see **Pub. 590**.

Box 3. Shows the amount converted from a traditional IRA, SEP IRA, or SIMPLE IRA to a Roth IRA in 2004. Use Form 8606 to figure the taxable amount.

Box 4. Shows amounts recharacterized from one type of contribution (plus earnings) from one type of IRA to another. See **Pub. 590**.

Box 5. Shows the fair market value of your account at year end. However, if a decedent's name is shown, the amount reported may be the FMV on the date of death. If the FMV shown is zero for a decedent, the executor or administrator of the estate may request a date-of-death value from the financial institution.

Box 6. For endorsement contracts only, shows the amount allocable to the cost of life insurance. Subtract this amount from your allowable IRA contribution included in box 1 to compute your IRA deduction.

Box 7. May show the kind of IRA reported on this Form 5498.

Box 8. Shows SEP contributions made in 2004, including contributions made in 2004 for 2003, but not including contributions made in 2005 for 2004. If made by your employer, do not deduct on your income tax return. If you made the contributions as a self-employed person (or partner), they may be deductible. See **Pub. 560**.

Box 9. Shows SIMPLE contributions made in 2004. If made by your employer, do not deduct on your income tax return. If you made the contributions as a self-employed person (or partner), they may be deductible. See **Pub. 560**.

Box 10. Shows Roth IRA contributions you made in 2004 and through April 15, 2005. Do not deduct on your income tax return.

Box 11. If you are checked, you must take a required minimum distribution (RMD) for 2005. An RMD may be required even if the box is not checked. The amount, or offer to compute the amount, and date of the RMD will be furnished to you by January 31 either on Form 5498 (in the blank box to the left of box 10) or in a separate statement. If you don't take the RMD for 2005, you are subject to a 20% excise tax on the amount not distributed. See **Pub. 590** for details.

1098-OMB # 1545-0986

The information in boxes 2, 3, and 4 is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this information is not reported and the IRS determines that it has not been reported.

1098-OMB # 1545-0986 is used to report the amount of mortgage interest paid during the year. This amount is deductible on your Form 1040, 1040A, or 1040EZ. A person (including a financial institution, a governmental unit, and a cooperative housing corporation) who is engaged in a trade or business and, in the course of such trade or business, received from you at least \$600 of mortgage interest (including certain points) on any one mortgage in the calendar year must furnish this statement to you.

If you received this statement as the payer of record on a mortgage on which there are other borrowers, furnish each of the other borrowers with information about the proper distribution of amounts reported on this form. Each borrower is entitled to deduct only the amount he or she paid and points paid by the seller that represent his or her share of the amount allowable as a deduction for mortgage interest and points. Each borrower may have to include in income a share of the amount reported in box 3.

If your mortgage payments were subsidized by a government agency, you may not be able to deduct the amount of the subsidy.

Box 1. Shows the mortgage interest received by the interest recipient during the year. This amount includes interest on any obligation secured by real property, such as a home equity line of credit, or credit card loan. This amount does not include points, government subsidy payments, or seller payments on a "buy-down" mortgage. Such amounts are deductible by you only in certain circumstances. **Caution:** If you prepaid interest in 2004 that accrued in full by January 15, 2005, this prepaid interest may be included in box 1. However, you cannot deduct the prepaid amount in 2004 even though it may be included in box 1. If you hold a mortgage credit certificate and can claim the mortgage interest credit, see **Form 8396**, Mortgage Interest Credit. If the interest was paid on a mortgage, loan exceeds \$100,000 (or \$50,000 if married filing separately), or together with other home loans, exceeds the fair market value of your home (such as in a high loan-to-value loan), your interest deduction may be limited. For more information, see **Pub. 936**, Home Mortgage Interest Deduction.

Box 2. Not all points are reportable to you. Box 2 shows points you or the seller paid this year for the purchase of your principal residence that are required to be reported to you. Generally, these points are fully deductible in the year paid, but you must subtract seller-paid points from the basis of your residence. Other points not reported in this box may also be deductible. See **Pub. 936** or Schedule A (Form 1040) instructions.

Box 3. Do not deduct this amount. It is a refund (or credit) for overpayment(s) of interest you made in a prior year or years. If you itemized deductions in the year(s) you paid the interest, include the total amount shown in box 3 on the "Other income" line of your 2004 Form 1040. However, do not report the refund as income if you did not itemize deductions in the year(s) you paid the interest. No adjustment to your prior year(s) tax return(s) is necessary. For more information, see **Pub. 936** and "Recoveries" in **Pub. 525**, Taxable and Nontaxable Income.

Box 4. The interest recipient may use this box to give you other information, such as the address of the property that secures the debt, real estate taxes or insurance paid from escrow.

RULE OF 78s Notice: The Rule of 78s Method of Accounting may have been used to calculate interest received. You, the borrower, may not deduct the amount reported unless you are also properly using the Rule of 78s method to determine interest deductions. The Rule of 78s calculation may only be used in the case of a self-amortizing consumer loan that requires level payments, at regular intervals (at least annually), over a period not in excess of 5 years (with no balloon payment at the end of the loan term), and only when the loan agreement provides for use of the Rule of 78s method to determine interest earned.

1099-C - OMB # 1545-1424

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this information is not reported and the IRS determines that it has not been reported.

If a Federal government agency, certain agency connected with the Federal government, financial institution, credit union, or an organization having a significant trade or business of lending money (such as a finance or credit card company) cancels or forgives a debt you owe of \$600 or more, this form must be provided to you. Generally, if you are an individual, you must include the canceled amount on the "Other income" line of Form 1040. If you are a corporation, partnership, or other entity, report the canceled debt on your tax return. See the instructions for your tax return.

However, some canceled debts are not includable in your income, such as certain student loans (see **Pub. 525**), certain debts reduced by the seller after purchase (see **Pub. 334**), qualified farm debt (see **Pub. 225**), qualified real property business debt (see **Pub. 334**), or debts canceled in bankruptcy (see **Pub. 909**). Do not report a canceled debt as income if you did not deduct it but would have been able to do so on your tax return if you had paid it. Also, do not include canceled debts in your income to the extent you were insolvent. If you exclude a canceled debt from your income because it was canceled in a bankruptcy case or during insolvency, or because the debt is qualified farm debt or qualified real property business debt, file **Form 962**, Reduction of Tax Attributes Due to Discharge of Indebtedness (and Section 1082 Basis Adjustment).

Box 1. Shows the date the debt was canceled.

Box 2. Shows the amount of debt canceled.

Box 3. Shows interest if included in the canceled debt in box 2. See **Pub. 525**, Taxable and Nontaxable Income.

Box 4. Shows a description of the debt. If box 7 is completed, box 5 shows a description of the property.

Box 6. If the box is marked, the creditor has indicated the debt was canceled in a bankruptcy proceeding.

Box 7. If, in the same calendar year, a foreclosure or abandonment of property occurred in connection with the cancellation of the debt, the fair market value of the property will be shown, or you will receive a separate **Form 1099-A**, Acquisition or Abandonment of Secured Property. You may have income or loss because of the acquisition or abandonment. See **Pub. 544**, Sales and Other Dispositions of Assets, for information about foreclosures and abandonments.

1099-S - OMB # 1545-0997

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this information is not reported and the IRS determines that it has not been reported.

The information on Form 1099-S is being furnished to the Internal Revenue Service and you must furnish this statement to you. To determine if you have to report the sale or exchange of your main home on your tax return, see the instructions for **Schedule D (Form 1040)**, Capital Gains and Losses. If the real estate was not your main home, report the transaction on **Form 4797**, Sales of Business Property, **Form 6252**, Installment Sale Income, and/or **Schedule D (Form 1040)**.

Federal mortgage subsidy. You may have to recapture (pay back) all or part of a Federal mortgage subsidy if **all** the following apply:

- You received a loan provided from the proceeds of a qualified mortgage bond or you received a mortgage credit certificate.
- Your original mortgage loan was provided after 1990, and
- You sold or disposed of your home (or main residence) during the first 5 years after you received the Federal mortgage subsidy.

This will increase your tax. See **Form 8826**, Recapture of Federal Mortgage Subsidy, and **Pub. 523**, Selling Your Home.

Box 1. Shows the date of closing.

Box 2. Shows the gross proceeds from a real estate transaction, generally the sales price. Gross proceeds include cash and notes payable to you, notes assumed by the transferee (buyer), and any notes paid off at settlement. Box 2 does not include the value of other property or services you received or are to receive. See **Box 4**.

Box 3. Shows the address or a legal description of the property transferred.

Box 4. If marked, shows that you received or will receive services or property (other than cash or notes) as part of the consideration for the property transferred. The value of any services or property (other than cash or notes) is not included in box 2.

Box 5. Shows certain real estate tax on a residence charged to the buyer at settlement. If you have already paid the real estate tax for the period that includes the sale date, subtract the amount in box 5 from the amount already paid to determine your deductible real estate tax. But if you have already deducted the real estate tax in a prior year, generally report this amount as income on the "Other income" line of Form 1040. For more information, see **Pub. 523**, **Pub. 525**, and **Pub. 530**.

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code STATE OF TEXAS DEFERRED COMPENSATION C/O JEFFERSON NATIONAL LIFE INSURANCE CO 9920 CORPORATE CAMPUS DRIVE SUITE 1000 LOUISVILLE, KY 40223 866-667-0561		1 Gross distribution \$4,117.26	OMB No. 1545-0119 2004 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 35-1802779		2a Taxable amount \$4,117.26	2b Taxable amount not determined <input type="checkbox"/> Total distribution <input type="checkbox"/>		
RECIPIENT'S name, street address, city, state, and ZIP code ALFRED HAMILTON 9008 EAST DR AUSTIN, TX 78753		3 Capital gain (included in box 2a)	4 Federal income tax withheld		Copy C For Recipients Records This information is being furnished to the Internal Revenue Service.
RECIPIENT'S identification number 458-24-4617		5 Employee contributions or insurance premiums	6 Net unrealized appreciation in employer's securities		
Account number (optional) SS003715		7 Distribution code(s) 7 <input type="checkbox"/>	8 Other <input type="checkbox"/>		12 State distribution \$4,117.26
Form 1099-R		9a Your percentage of total distribution %	9b Total employee contributions		
		10 State tax withheld \$0.00	11 State/Payer's state no. TX/		15 Local distribution \$0.00
		13 Local tax withheld \$0.00	14 Name of locality		
		(keep for your records)			Department of the Treasury-Internal Revenue Service

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code STATE OF TEXAS DEFERRED COMPENSATION C/O JEFFERSON NATIONAL LIFE INSURANCE CO 9920 CORPORATE CAMPUS DRIVE SUITE 1000 LOUISVILLE, KY 40223 866-667-0561		1 Gross distribution \$4,117.26	OMB No. 1545-0119 2004 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 35-1802779		2a Taxable amount \$4,117.26	2b Taxable amount not determined <input type="checkbox"/> Total distribution <input type="checkbox"/>		
RECIPIENT'S name, street address, city, state, and ZIP code ALFRED HAMILTON 9008 EAST DR AUSTIN, TX 78753		3 Capital gain (included in box 2a)	4 Federal income tax withheld		Copy B Report this income on your Federal tax return. If this form shows Federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the Internal Revenue Service.
RECIPIENT'S identification number 458-24-4617		5 Employee contributions or insurance premiums	6 Net unrealized appreciation in employer's securities		
Account number (optional) SS003715		7 Distribution code(s) 7 <input type="checkbox"/>	8 Other <input type="checkbox"/>		12 State distribution \$4,117.26
Form 1099-R		9a Your percentage of total distribution %	9b Total employee contributions		
		10 State tax withheld \$0.00	11 State/Payer's state no. TX/		15 Local distribution \$0.00
		13 Local tax withheld \$0.00	14 Name of locality		
		Department of the Treasury-Internal Revenue Service			

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code STATE OF TEXAS DEFERRED COMPENSATION C/O JEFFERSON NATIONAL LIFE INSURANCE CO 9920 CORPORATE CAMPUS DRIVE SUITE 1000 LOUISVILLE, KY 40223 866-667-0561		1 Gross distribution \$4,117.26	OMB No. 1545-0119 2004 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 35-1802779		2a Taxable amount \$4,117.26	2b Taxable amount not determined <input type="checkbox"/> Total distribution <input type="checkbox"/>		
RECIPIENT'S name, street address, city, state, and ZIP code ALFRED HAMILTON 9008 EAST DR AUSTIN, TX 78753		3 Capital gain (included in box 2a)	4 Federal income tax withheld		Copy 2 File this copy with your state, city, or local income tax return, when required.
RECIPIENT'S identification number 458-24-4617		5 Employee contributions or insurance premiums	6 Net unrealized appreciation in employer's securities		
Account number (optional) SS003715		7 Distribution code(s) 7 <input type="checkbox"/>	8 Other <input type="checkbox"/>		12 State distribution \$4,117.26
Form 1099-R		9a Your percentage of total distribution %	9b Total employee contributions		
		10 State tax withheld \$0.00	11 State/Payer's state no. TX/		15 Local distribution \$0.00
		13 Local tax withheld \$0.00	14 Name of locality		
		Department of the Treasury-Internal Revenue Service			

2637

ALFRED HAMILTON
9008 EAST DR
AUSTIN TX 78753-5112



1099-R Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans (including section 457 state and local government plans), IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

Qualified plans. If your annuity starting date is after 1997, you must use the simplified method to figure your taxable amount if your payer did not show the taxable amount in box 2a. See **Pub. 575**, Pension and Annuity Income.

IRAs. For distributions from a traditional individual retirement arrangement (IRA), simplified employee pension (SEP), or savings incentive match plan for employees (SIMPLE), generally the payer is not required to compute the taxable amount. Therefore, the amounts in boxes 1 and 2a will be the same most of the time. See the Form 1040 or 1040A instructions to determine the taxable amount. If you are at least age 70 1/2, you must take minimum distributions from your IRA (other than a Roth IRA). If you do not, you may be subject to a 50% excise tax on the amount that should have been distributed. See **Pub. 590**, Individual Retirement Arrangements (IRAs), and **Pub. 560**, Retirement Plans for Small Business (SEP, SIMPLE, and Qualified Plans), for more information on IRAs.

Roth IRAs. For distributions from a Roth IRA, generally the payer is not required to compute the taxable amount. You must compute any taxable amount on **Form 8606**, Nondeductible IRAs. An amount shown in box 2a may be taxable earnings on an excess contribution.

Loans treated as distributions. If you borrow money from a qualified plan, tax-sheltered annuity, or government plan, you may have to treat the loan as a distribution and include all or part of the amount borrowed in your income. There are exceptions to this rule. If your loan is taxable, Code L will be shown in box 7. See **Pub. 575**.

Box 1. Shows the total amount you received this year. The amount may have been a direct rollover, a transfer or conversion to a Roth IRA, a recharacterized IRA contribution; or you may have received it as periodic payments, as nonperiodic payments, or as a total distribution. Report the amount on Form 1040 or 1040A on the line for "IRA distributions" or "Pensions and annuities" (or the line for "Taxable amount"), and on Form 8606, whichever applies. However, if this is a lump-sum distribution, report it on **Form 4972**, Tax on Lump-Sum Distributions. If you have not reached minimum retirement age, report your disability payments on the line for "Wages, salaries, tips, etc." Also report on that line corrective distributions of excess deferrals, excess contributions, or excess aggregate contributions.

If a life insurance, annuity, or endowment contract was transferred tax free to another trustee or contract issuer, an amount will be shown in this box and Code 6 will be shown in box 7. You need not report this on your tax return.

Box 2a. This part of the distribution is generally taxable. If there is no entry in this box, the payer may not have all the facts needed to figure the taxable amount. In that case, the first box in box 2b should be checked. You may want to get one of the following publications from the IRS to help you figure the taxable amount: **Pub. 560**, **Pub. 571**, Tax-Sheltered Annuity Plans (403(b) Plans) for Employees of Public Schools and Certain Tax-Exempt Organizations, **Pub. 575**, **Pub. 590**, **Pub. 721**, Tax Guide to U.S. Civil Service Retirement Benefits, or **Pub. 939**, General Rule for Pensions and Annuities. For an IRA distribution, see **IRAs** and **Roth IRAs** above.

For a direct rollover, zero should be shown, and you must enter zero (-0-) on the "Taxable amount" line of your tax return.

If this is a total distribution from a qualified plan (other than an IRA or tax-sheltered annuity) and you were born before January 2, 1936 (or you are the beneficiary of someone born before January 2, 1936), you may be eligible for the 10-year tax option. See the **Instructions for Form 4972** for more information.

Box 2b. If the first box is checked, the payer was unable to determine the taxable amount, and box 2a should be blank. However, if this is a traditional IRA, SEP, or SIMPLE distribution, then see **IRAs** above. If the second box is checked, the distribution was a total distribution that closed out your account.

Box 3. If you received a lump-sum distribution from a qualified plan and were born before January 2, 1936 (or you are the beneficiary of someone born before January 2, 1936), you may be able to elect to treat this amount as a capital gain on Form 4972 (not on Schedule D (Form 1040)). See the **Instructions for Form 4972**. For a charitable gift annuity, report as a long-term capital gain on Schedule D (Form 1040).

Box 4. This is the amount of Federal income tax withheld. **Include this on your income tax**

return as tax withheld, and if box 4 shows an amount (other than zero), attach Copy B to your return. Generally, if you will receive payments next year that are not eligible rollover distributions, you can change your withholding or elect not to have income tax withheld by giving the payer **Form W-4P**, Withholding Certificate for Pension or Annuity Payments.

Box 5. Generally, this shows the employee's investment in the contract (after-tax contributions), if any, recovered tax free this year; the part of premiums paid on commercial annuities or insurance contracts recovered tax free; or the nontaxable part of a charitable gift annuity. This box does not show any IRA contributions.

Box 6. If you received a lump-sum distribution from a qualified plan that includes securities of the employer's company, the net unrealized appreciation (NUA) (any increase in value of such securities while in the trust) is taxed only when you sell the securities unless you choose to include it in your gross income this year. See **Pub. 575** and the **Instructions for Form 4972**. If you did not receive a lump-sum distribution, the amount shown is the NUA attributable to employee contributions, which is not taxed until you sell the securities.

Box 7. The following codes identify the distribution you received. 1-Early distribution, no known exception (in most cases, under age 59 1/2). See the Form 1040/1040A instructions and **Form 5329**, Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts. For a rollover to a traditional IRA of the entire taxable part of the distribution, do not file Form 5329. See the Form 1040/1040A instructions. 2 -Early distribution, exception applies (under age 59 1/2)*. 3-Disability*. 4-Death*. 5-Prohibited transaction. 6-Section 1035 exchange (a tax-free exchange of life insurance, annuity, or endowment contracts). 7-Normal distribution. 8-Excess contributions plus earnings/excess deferrals (and/or earnings) taxable in 2004. 9-Cost of current life insurance protection (premiums paid by a trustee or custodian for current insurance protection, taxable to you currently). A-May be eligible for 10-year tax option. See Form 4972. D- Excess contributions plus earnings/excess deferrals taxable in 2002. E-Excess annual additions under section 415 and certain excess amounts under section 403(b) plans. Report on Form 1040/1040A on the line for taxable pension or annuity income*. F-Charitable gift annuity. G-Direct rollover to a qualified plan, a tax-sheltered annuity, a governmental 457(b) plan, or an IRA. May also include a transfer from a conduit IRA to a qualified plan*. J-Early distribution from a Roth IRA, no known exception (in most cases, under age 59 1/2). Report on Forms 1040 and 8606 and see Form 5329. L-Loans treated as distributions. N-Recharacterized IRA contribution made for 2004 and recharacterized in 2004. Report on 2004 Form 1040/1040A and Form 8606, if applicable. P-Excess contributions plus earnings/excess deferrals taxable in 2003. Q-Qualified distribution from a Roth IRA. You are age 59 1/2 or over and meet the 5-year holding period for a Roth IRA. See the Form 1040/1040A instructions*. R-Recharacterized IRA contribution made for 2003 and recharacterized in 2004. Report on 2003 Form 1040/1040A and form 8606, if applicable. S-Early distribution from a SIMPLE IRA in first 2 years, no known exception (under age 59 1/2). May be subject to an additional 25% tax. See Form 5329. T-Roth IRA distribution, exception applies. (You may not meet the 5-year holding period.) You are either age 59 1/2 or over or an exception (code 3 or 4) applies. See the Form 1040/1040A instructions.

If the IRA/SEP/SIMPLE box is checked, you have received a traditional IRA, SEP, or SIMPLE distribution.

Box 8. If you received an annuity contract as part of a distribution, the value of the contract is shown. It is not taxable when you receive it and should not be included in boxes 1 and 2a. When you receive periodic payments from the annuity contract, they are taxable at that time. If the distribution is made to more than one person, the percentage of the annuity contract distributed to you is also shown. You will need this information if you use the 10-year tax option (Form 4972).

Box 9a. If a total distribution was made to more than one person, the percentage you received is shown.

Box 9b. For a life annuity from a qualified plan or from a tax-sheltered annuity (with after-tax contributions), an amount may be shown for the employee's total investment in the contract. It is used to compute the taxable part of the distribution. See **Pub. 575**.

Boxes 10-15. If state or local income tax was withheld from the distribution, these boxes may be completed. Boxes 12 and 15 may show the part of the distribution subject to state and/or local tax.

*You are not required to file Form 5329.

08/03/04

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Defense Finance and Accounting Service US MILITARY RETIREMENT PAY PO BOX 7130 LONDON KY 40742-7130		1 Gross distribution \$ 818.80	OMB No. 1545-0119 2004	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
		2a Taxable amount \$ 818.80			
PAYER'S Federal identification number 34-0727612	RECIPIENT'S identification number 459-20-2593	2b Total distribution <input checked="" type="checkbox"/>			
RECIPIENT'S name, address and ZIP code MAURINE P HAMILTON A/C ALFRED HAMILTON RET/DEC 9008 EAST DR AUSTIN TX 78753-5112		4 Federal income tax withheld \$	7 Distribution code 4	Copy 2 File this copy with your state, city, or local income tax return, when required.	
		9 Your percentage of total distribution %			
		10 State income tax withheld \$	11 State/Payer's state number		
		ARREARS 040104-040804			

Form 1099-R

(6-92)

Department of the Treasury-Internal Revenue Service

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08/03/04

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Defense Finance and Accounting Service US MILITARY RETIREMENT PAY PO BOX 7130 LONDON KY 40742-7130		1 Gross distribution \$ 818.80	OMB No. 1545-0119 2004	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
		2a Taxable amount \$ 818.80			
PAYER'S Federal identification number 34-0727612	RECIPIENT'S identification number 459-20-2593	2b Total distribution <input checked="" type="checkbox"/>			
RECIPIENT'S name, address and ZIP code MAURINE P HAMILTON A/C ALFRED HAMILTON RET/DEC 9008 EAST DR AUSTIN TX 78753-5112		4 Federal income tax withheld \$	7 Distribution code 4	Copy B Report this income on your Federal tax return. If this form shows Federal income tax withheld in Box 4, attach this copy to your return. This information is being furnished to the Internal Revenue Service.	
		9 Your percentage of total distribution %			
		10 State income tax withheld \$	11 State/Payer's state number		
		ARREARS 040104-040804			

Form 1099-R

(6-92)

Department of the Treasury-Internal Revenue Service

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08/03/04

CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code Defense Finance and Accounting Service US MILITARY RETIREMENT PAY PO BOX 7130 LONDON KY 40742-7130		1 Gross distribution \$ 818.80	OMB No. 1545-0119 2004	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
		2a Taxable amount \$ 818.80			
PAYER'S Federal identification number 34-0727612	RECIPIENT'S identification number 459-20-2593	2b Total distribution <input checked="" type="checkbox"/>			
RECIPIENT'S name, address and ZIP code MAURINE P HAMILTON A/C ALFRED HAMILTON RET/DEC 9008 EAST DR AUSTIN TX 78753-5112		4 Federal income tax withheld \$	7 Distribution code 4	Copy C For Recipient's Records This information is being furnished to the Internal Revenue Service. Keep this copy for your records.	
		9 Your percentage of total distribution %			
		10 State income tax withheld \$	11 State/Payer's state number		
		ARREARS 040104-040804			

Form 1099-R

(6-92)

Department of the Treasury-Internal Revenue Service

Instructions to Recipient

All distributions from military retired pay, pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

Box 1. - Shows the total amount you received this year. For military retired benefits, this amount is the gross benefit, minus non-taxable items such as VA compensation, disability retirement, SBP/RSFP premiums, etc. For annuity recipients, this amount is the gross annuity minus SSA offset and DIC. For beneficiaries, this amount is the unpaid retirement or annuity benefit as described above. For former spouses, this is the distribution of court ordered division of property.

Report the amount printed in **Box 1** of the Form 1099-R on your **Form 1040 or 1040A**.

Box 2a. - Same as **Box 1** above.

Box 2b. - Not used.

Box 4. - This is the amount of Federal income tax withheld on the distribution. **Include this on your income tax return as tax withheld, and attach Copy B to your return.** If you will receive payments next year and you want to increase or decrease your withholding or you want to elect not to have income tax withheld, you must submit a new **Form W-4** (for retirees), or **Form W-4P** (for all annuitants and former spouse payees receiving court-ordered division of property).

Box 7. - The code listed identifies the distribution you received: **3** - Disability (You need not file Form 5329.); **4** - Death (You need not file Form 5329.); or, **7** - Normal distribution.

Box 9. - Not used.

Boxes 10 and 11. - If state income tax was withheld from the distribution, these may be completed.

NOTE: Boxes 3,5,6,8,12,13,14 and 15 have been deleted from this form.

PAYER'S name, street address, city, state, and ZIP code Employees Retirement System of Texas P. O. Box 13207 Austin TX 78711		1. Gross distribution \$ 11,350.32 2a. Taxable amount \$ 10,779.66	OMB No 1545-0119 2004 Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 746000098	RECIPIENT'S identification number 458-24-4617	2b Taxable amount not determined <input type="checkbox"/>	Total distribution <input type="checkbox"/>	Copy B Report this income on your Federal tax return. If this form shows Federal income tax withheld in box 4, attach this copy to your return.
RECIPIENT'S name, street address, city, state, and ZIP code Alfred Hamilton 580 COUNTRY RD 329 YOAKUM, TX 77995		3 Capital Gain (included in box 2a) \$	4 Federal Income Tax withheld \$	
Account number (optional) 45824461745824461701		5 Employee Contributions \$ 570.66	6 Net unrealized appreciation in employer's securities \$	This information is being furnished to the Internal Revenue Service.
		7 Distribution code 7	8 Other \$	
		9a Your percentage of total distribution %	9b Total employee contributions \$	
		10 State Tax withheld \$	11 State/Payer's state no.	12 State distribution \$
		13 Local Tax withheld \$	14 Name of locality	15 Local distribution \$

Form 1099-R

Department of the Treasury - Internal Revenue Service

PAYER'S name, street address, city, state, and ZIP code Employees Retirement System of Texas P. O. Box 13207 Austin TX 78711		1. Gross distribution \$ 11,350.32 2a. Taxable amount \$ 10,779.66	OMB No 1545-0119 2004 Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S Federal identification number 746000098	RECIPIENT'S identification number 458-24-4617	2b Taxable amount not determined <input type="checkbox"/>	Total distribution <input type="checkbox"/>	Copy C For Recipient's Records
RECIPIENT'S name, street address, city, state, and ZIP code Alfred Hamilton 580 COUNTRY RD 329 YOAKUM, TX 77995		3 Capital Gain (included in box 2a) \$	4 Federal Income Tax withheld \$	
Account number (optional) 45824461745824461701		5 Employee Contributions \$ 570.66	6 Net unrealized appreciation in employer's securities \$	This information is being furnished to the Internal Revenue Service.
		7 Distribution code 7	8 Other \$	
		9a Your percentage of total distribution %	9b Total employee contributions \$	
		10 State Tax withheld \$	11 State/Payer's state no.	12 State distribution \$
		13 Local Tax withheld \$	14 Name of locality	15 Local distribution \$

Form 1099-R

(Keep for your records)

Department of the Treasury - Internal Revenue Service

Fraudulent filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K-17-484s - The Disappearing Trust IRS

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans (including section 457 state and local government plans), IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

Qualified plans. If your annuity starting date is after 1997, you must use the simplified method to figure your taxable amount if your payer did not show the taxable amount in box 2a. See **Pub. 575**, Pension and Annuity Income.

IRAs For distributions from a traditional individual retirement arrangement (IRA), simplified employee pension (SEP), or savings incentive match plan for employees (SIMPLE), generally the payer is not required to compute the taxable amount. Therefore, the amounts in boxes 1 and 2a will be the same most of the time. See the Form 1040 or 1040A instructions to determine the taxable amount. If you are at least age 70 1/2, you must take minimum distributions from your IRA (other than a Roth IRA). If you do not, you may be subject to a 50% excise tax on the amount that should have been distributed. See **Pub. 590**, Individual Retirement Arrangements (IRAs) and **Pub. 560**, Retirement Plans for Small Business (SEP, SIMPLE, and Qualified Plans), for more information on IRAs.

Roth IRAs. For distributions from a Roth IRA, generally the payer is not required to compute the taxable amount. You must compute any taxable amount on **Form 8606**, Nondeductible IRAs. An amount shown in box 2a may be taxable earnings on an excess contribution.

Loans treated as distributions. If you borrow money from a qualified plan, tax-sheltered annuity, or government plan, you may have to treat the loan as a distribution and include all or part of the amount borrowed in your income. There are exceptions to this rule. If your loan is taxable, Code L will be shown in box 7. See **Pub. 575**.

Box 1. Shows the total amount you received this year. The amount may have been a direct rollover, a transfer or conversion to a Roth IRA, a recharacterized IRA contribution; or you may have received it as periodic payments, as nonperiodic payments, or as a total distribution. Report the amount on Form 1040 or 1040A on the line for "IRA distributions" or "Pensions and annuities" (or the line for "Taxable amount"), and on Form 8606, whichever applies. However, if this is a lump-sum distribution, report it on **Form 4972**, Tax on Lump-Sum

Distribution. If you have not reached minimum retirement age, report your disability payments on the line for "Wages, salaries, tips, etc." Also report on that line corrective distributions of excess deferrals, excess contributions, or excess aggregate contributions.

If a life insurance, annuity, or endowment contract was transferred tax free to another trustee or contract issuer, an amount will be shown in this box and Code 6 will be shown in box 7. You need not report this on your tax return.

Box 2a. This part of the distribution is generally taxable. If there is no entry in this box, the payer may not have all the facts needed to figure the taxable amount. In that case, the first box in box 2b should be checked. You may want to get one of the following publications from the IRS to help you figure the taxable amount: **Pub. 560**, **Pub. 571** Tax-Sheltered Annuity Plans (403(b) Plans) for Employees of Public Schools and Certain Tax-Exempt Organizations, **Pub. 575**, **Pub. 590**, **Pub. 721**, Tax Guide to U.S. Civil Service Retirement Benefits, or **Pub. 939**, General Rules for Pensions and Annuities. For an IRA distribution, see **IRAs** and **Roth IRAs** above. For a direct rollover, zero should be shown, and you must enter zero (-0-) on the "Taxable amount" line of your tax return.

If this is a total distribution from a qualified plan (other than an IRA or tax-sheltered annuity) and you were born before January 2, 1936 (or you are the beneficiary of someone born before January 2, 1936), you may be eligible for the 10-year tax option. See the **Instructions for Form 4972** for more information.

Box 2b. If the first box is checked, the payer was unable to determine the taxable amount and box 2a should be blank. However, if this is a traditional IRA, SEP, or SIMPLE distribution, then see **IRAs** above. If the second box is checked, the distribution was a total distribution that closed out your account.

Box 3. If you received a lump-sum distribution from a qualified plan and were born before January 2, 1936 (or you are the beneficiary of someone born before January 2, 1936), you may be able to elect to treat this amount as a capital gain on Form 4972 (not on Schedule D (Form 1040)). See the **Instructions for Form 4972**. For a charitable gift annuity, report as a long-term capital gain on Schedule D (Form 1040).

(Continued on the back of Copy C.)

Instructions for Recipient

(Continued)

Box 4. This is the amount of Federal income tax withheld. **Include this on your income tax return as tax withheld, and if box 4 shows an amount (other than zero), attach Copy B to your return.** Generally, if you will receive payments next year that are not eligible rollover distributions, you can change your withholding or elect not to have income tax withheld by giving the payer **Form W-4P**, Withholding Certificate for Pension or Annuity Payments.

Box 5. Generally, this shows the employee's investment in the contract (after-tax contributions), if any, recovered tax free this year; the part of premiums paid on commercial annuities or insurance contracts recovered tax free; or the nontaxable part of a charitable gift annuity. This box does not show any IRA contributions.

Box 6. If you received a lump-sum distribution from a qualified plan that includes securities of the employer's company, the net unrealized appreciation (NUA) (any increase in value of such securities while in the trust) is taxed only when you sell the securities unless you choose to include it in your gross income this year. See **Pub. 575** and the **Instructions for Form 4972**. If you did not receive a lump-sum distribution, the amount shown is the NUA attributable to employee contributions, which is not taxed until you sell the securities.

Box 7. The following codes identify the distribution you received.

1- Early distribution, no known exception (in most cases, under age 59 1/2). See the Form 1040/1040A instructions and **Form 5329**, Additional Taxes on Qualified Plans (including IRAs) and Other Tax-Favored Accounts. For a rollover to a traditional IRA of the entire taxable part of the distribution, do not file Form 5329. See the Form 1040/1040A instructions. **2-** Early distribution, exception applies (under age 59 1/2)*. **3-** Disability*. **4-** Death*. **5-** Prohibited transaction. **6-** Section 1035 exchange (a tax-free exchange of life insurance, annuity, or endowment contracts). **7-** Normal distribution. **8-** Excess contributions plus earnings/excess deferrals (and/or earnings) taxable in 2004. **9-** Cost of current life insurance protection (premiums paid by a trustee or custodian for current insurance protection, taxable to you currently). **A-** May be eligible for 10-year tax option. See **Form 4972**.

D- Excess contributions plus earnings/excess deferrals taxable in 2002. **E-** Excess annual additions under section 415 and certain excess amounts under section 403(b) plans. Report on Form 1040/1040A on the line for taxable pension or annuity income*.

F- Charitable gift annuity. **G-** Direct rollover to a qualified plan, a tax-sheltered annuity, a governmental 457(b) plan, or an IRA. May also include a transfer from a conduit IRA to a qualified plan*. **J-** Early distribution from a Roth IRA, no known exception (in most cases, under age 59 1/2). Report on Forms 1040 and 8606 and see Form 5329. **L-** Loans treated as distributions. **N-** Recharacterized IRA contribution made for 2004 and recharacterized in 2004. Report on 2004 Form 1040/1040A and Form 8606, if applicable. **P-** Excess contributions plus earnings/excess deferrals taxable in 2003. **Q-** Qualified distribution from a Roth IRA. You are age 59 1/2 or over and meet the 5-year holding period for a Roth IRA. See the Form 1040/1040A instructions*.

R- Recharacterized IRA contribution made for 2003 and recharacterized in 2004. Report on 2003 Form 1040/1040A and Form 8606, if applicable.

S- Early distribution from a SIMPLE IRA in first 2 years, no known exception (under age 59 1/2). May be subject to an additional 25% tax. See Form 5329.

T- Roth IRA distribution, exception applies. You are either age 59 1/2 or over or an exception (code 3 or 4) applies. See the Form 1040/1040A instructions.

If the IRA/SEP/SIMPLE box is checked, you have received a traditional IRA, SEP, or SIMPLE distribution.

Box 8. If you received an annuity contract as part of a distribution, the value of the contract is shown. It is not taxable when you receive it, and should not be included in boxes 1 and 2a. When you receive periodic payments from the annuity contract, they are taxable at that time. If the distribution is made to more than one person, the percentage of the annuity contract distributed to you is also shown. You will need this information if you use the special 10-year tax option (Form 4972).

Box 9a. If a total distribution was made to more than one person, the percentage you received is shown.

Box 9b. For a life annuity from a qualified plan or from a tax-sheltered annuity (with after-tax contributions), an amount may be shown for the employee's total investment in the contract. It is used to compute the taxable part of the distribution. See **Pub. 575**.

Boxes 10-15. If state or local income tax was withheld from the distribution, these boxes may be completed. Boxes 12 and 15 may show the part of the distribution subject to state and/or local tax.

* You are not required to file Form 5329.

GUARANTY BANK

P.O. BOX 1149
AUSTIN, TEXAS 78767
1-800-288-8822

INTEREST INCOME

PAYER EIN - 74-2511478

FORM 1099-INT, INTEREST INCOME
FOR CALENDAR YEAR 2004

SEQ# 1
OMB NO. 1545-0112



MAURINE P HAMILTON
9008 EAST DR APT A
AUSTIN TX 78753-5112

RECIPIENT'S
IDENTIFYING NUMBER:
459-20-2593

NOTE: THIS IS IMPORTANT TAX INFORMATION AND IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. IF YOU ARE REQUIRED TO FILE A RETURN, A NEGLIGENCE PENALTY OR OTHER SANCTION MAY BE IMPOSED ON YOU IF THIS INCOME IS TAXABLE AND THE IRS DETERMINES THAT IT HAS NOT BEEN REPORTED.

ACCOUNT TYPE	ACCOUNT NUMBER	BOX 1 INTEREST	BOX 2 PENALTY	BOX 3 INTEREST	BOX 4 FED TAX
FLEXRATE FUND	4440309567	259.90	0.00	0.00	0.00
CHECKING ACCT	0038054700	24.61	0.00	0.00	0.00
TOTALS : (THE FOLLOWING TOTALS ARE BEING FURNISHED TO THE IRS.)					
BOX 1 - INTEREST INCOME NOT INCLUDED IN BOX 3				\$	284.51
BOX 2 - EARLY WITHDRAWAL PENALTY				\$	0.00
BOX 3 - INTEREST ON U.S. SAVINGS BONDS AND TREASURY OBLIGATIONS				\$	0.00
BOX 4 - FEDERAL INCOME TAX WITHHELD				\$	0.00
BOX 5 - FOREIGN TAX PAID					
BOX 6 - FOREIGN COUNTRY OR U.S. POSSESSION				\$	0.00

----- COPY B OF FORM 1099-INT - FOR RECIPIENT -----
DEPARTMENT OF TREASURY - INTERNAL REVENUE SERVICE

BOX 1 and BOX 2 totals include forfeited interest.

INSTRUCTIONS FOR RECIPIENT

Box 1.-- Shows interest paid to you during the calendar year by the payer. This does not include interest shown in Box 3.

If you receive a Form 1099-INT for interest paid on a tax-exempt obligation, see the instructions for your income tax return.

Box 2.-- Shows interest or principal forfeited because of early withdrawal of time savings. You may deduct this amount to figure your adjusted gross income on your income tax return. See the instructions for **Form 1040** to see where to take the deduction.

Box 3.-- Shows interest on U.S. Savings Bonds, Treasury bills, Treasury bonds, and Treasury notes. This may or may not be all taxable. See **Pub. 550**, Investment Income and Expenses. This interest is exempt from state and local income taxes. **This interest is not included in Box 1.**

Box 4.-- Shows backup withholding. Generally, a payer must backup withhold at a 28% rate if you did not furnish your taxpayer identification number (TIN) or you did not furnish the correct TIN to the payer. See **Form W-9**, Request for Taxpayer Identification Number and Certification, for information on backup withholding. **Include this amount on your income tax return as tax withheld.**

Box 5.-- Any amount shown is your share of investment expenses of a single-class REMIC. If you file Form 1040, you may deduct these expenses on the "Other expenses" line of **Schedule A (Form 1040)** subject to the 2% limit. This amount is included in box 1.

Box 6.-- Shows foreign tax paid. You may be able to claim this tax as a deduction or a credit on your Form 1040. See your Form 1040 instructions.

Nominees.-- If this form includes amounts belonging to another person(s), you are considered a nominee recipient. Complete a Form 1099-INT for each of the other owners showing the income allocable to each. File Copy A of the form with the IRS. Furnish Copy B to each owner. List yourself as the "payer" and the owner as the "recipient". File Form(s) 1099-INT with **Form 1096**, Annual Summary and Transmittal of U.S. Information Returns, with the Internal Revenue Service Center for your area. On Form 1096, list yourself as the "filer." A husband or wife is not required to file a nominee return to show amounts owned by the other.

**BANK OF AMERICA, N.A.
MILITARY BANK
1422 E GRAYSON
SAN ANTONIO, TX 78208-8000**

**COMBINED TAX STATEMENT
FOR YEAR 2004**

THIS STATEMENT REPORTS 1099-DIV (OMB No. 1545-0110), 1099-INT (OMB No. 1545-0112), 1099-OID (OMB No. 1545-0117), 1098 (OMB No. 1545-0901), 5498 (OMB No. 1545-0747), 5498-ESA (OMB No. 1545-1815), 1099-MISC (OMB No. 1545-0115), 1099-B (OMB No. 1545-0715), 1099-Q (OMB No. 1545-1760), 1099-A (OMB No. 1545-0877), 1099-C (OMB No. 1545-1424), 1099-S (OMB No. 1545-0997), 1098-E (OMB No. 1545-1576).
DEPARTMENT OF THE TREASURY-INTERNAL REVENUE SERVICE.

Bank of America



BANK# 0550

00050243 A1 0209

*****AUTO**3-DIGIT787

**ALFRED/MAURINE P HAMILTON TRUST 12-
9008 EAST DR
AUSTIN, TX 78753-5112**

**PAYERS E. I. N.
94-1687665**

**CUST SERV PH #
(800) 334-1920**

**TAXPAYER IDENTIFICATION NUMBER
459-20-2593**

"For Form 1099-B, DIV, INT, MISC and OID, this is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported."

ACCOUNT NUMBER	ACCOUNT TYPE	IRS DESCRIPTION	IRS BOX #	AMOUNT
000007475838198	DEPOSIT ACCT	INTEREST INCOME	1	764.10
* * * 2004 - 1099-INT, INTEREST INCOME * * *				
ALFRED/MAURINE P HAMILTON TRUST 12-13-96				

PLEASE NOTE: INQUIRIES REGARDING THESE ACCOUNTS SHOULD BE DIRECTED TO OUR CUSTOMER SERVICE PHONE NUMBER ABOVE. PLEASE CHECK YOUR TAXPAYER IDENTIFICATION NUMBER AND CALL THE NUMBER LISTED ABOVE IF IT IS INCORRECT.

TDD HEARING IMPAIRED PLEASE CALL 1-800-288-4408

*FORM 1099 OID: THIS MAY NOT BE THE CORRECT FIGURE TO REPORT ON YOUR INCOME TAX RETURN. SEE INSTRUCTIONS ON BACK.

ACCOUNT SUMMARY

**TOTAL EARNINGS INT.
ORD. DIV AND OID'S**

764.10

Produced and filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1588888 - The Disabling Trust Inc

2004 FORM 1099-INT STATEMENT FOR RECIPIENTS OF INTEREST INCOME

PAYER: 74-1185010
 RANDOLPH BROOKS FEDERAL CREDIT UNION
 P.O. BOX 2097
 UNIVERSAL CITY, TX 78148-2097
 (210) 945-3300

THIS IMPORTANT TAX INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. IF YOU ARE REQUIRED TO FILE A RETURN, A NEGLIGENCE PENALTY OR OTHER SANCTION MAY BE IMPOSED ON YOU IF THIS INCOME IS TAXABLE AND THE INTERNAL REVENUE SERVICE DETERMINES THAT IT HAS NOT BEEN REPORTED.

TYPE OF ACCOUNT	EARNINGS PAID	FEDERAL INCOME TAX WITHHELD
SAVINGS	2.71	.00
CHECKING	5.97	.00
MONEY MARKET	1013.08	.00
CERTIFICATES	.00	.00
U.S. SAVINGS BONDS	.00	.00
TOTAL EARNINGS REPORTED TO THE IRS	1021.76	1 TOTAL TAX WITHHELD .00
AMOUNT OF FORFEITURE ON CERTIFICATES	.00	3

CREDIT UNION ACCOUNT NUMBER 446951-8
RECIPIENT'S ID NUMBER 459-20-2593

COPY B FOR RECIPIENT

OMB No. 1545-0112

**RANDOLPH BROOKS
 FEDERAL CREDIT UNION**

P.O. BOX 2097
 Universal City, Texas 78148-2097
 IMPORTANT TAX RETURN DOCUMENT ENCLOSED

142-002-00035 18890-1



MAURINE P HAMILTON
 SYLVIA LYNN HAMILTON
 9008 EAST DR
 AUSTIN TX 78753-5112

If produced with IRS Form 1099-INT by Danny Davila and Sylvia Hamilton - No 1041-K1s-46845 - The Disappearing Trusting

Instructions for Recipient

The amount listed in Box 1 is the amount of interest paid to you during the calendar year. If this amount includes interest paid on U.S. Savings Bonds, Treasury bills, and Treasury notes, this amount may or may not all be taxable. See PUB. 550, Investment Income and Expenses. Savings Bond interest is exempt from state and local taxes.

If you receive a Form 1099-INT for interest paid on a tax-exempt obligation, please see the instructions for your 2004 income tax return.

Any amount listed in Box 2 represents backup withholding. For example, persons not furnishing their taxpayer identification number to the payer become subject to backup withholding at a 28% rate on interest paid. See form W-9, Payer's Request for Taxpayer Identification Number, for information on back up withholding. Include this amount on your income tax return as tax withheld.

Box 3 shows interest or principal forfeited because of early withdrawal of certificates. You may deduct this amount to figure your adjusted gross income on your tax return. See the instructions for Form 1040 to see where to take the deduction.

If your Federal identification number is shown on this form, and the form includes amounts belonging to another person, you are considered a nominee recipient. You must file Form 1099-INT for each of the other owners showing the income allocable to each. File Copy A of the forms with the IRS. Furnish Copy B to each owner. File Forms 1099-INT with Form 1096, Annual Summary and Transmittal of U.S. Information Returns, at the Internal Revenue Service Center for your area. On forms 1099-INT, list yourself as the "payer" and the other owner(s) as the "recipient." On Form 1096, list yourself as the "filer." A husband or wife is not required to file a nominee return to show amounts owned by the other.

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1047-KS-MoPA - The Disappearing Trust Trick

HANDOLPH BROOKS
FEDERAL CREDIT UNION
10000 10th Street
Austin, TX 78758-2112

STEVIA LEVY HAMILTON
2004 EAST 20
AUSTIN, TX 78722-2112

<p>ACCOUNT NUMBER: UA8441079 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: 470322111 RECIPIENT'S: 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>33,668.54</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>3,668.54</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>0.00</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	33,668.54	2A. TAXABLE AMOUNT.....	3,668.54	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	0.00	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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Filed with IRS in late 2008 by Danny Paula and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER:

UA8441079 7 1 CPUAR 000882

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCISE TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972, TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED. YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT: PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS, PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND BOTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR; THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE; OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329). FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329); 3-DISABILITY (YOU NEED NOT FILE FORM 5329); 4-DEATH (YOU NEED NOT FILE FORM 5329); 5-PROHIBITED TRANSACTIONS; 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; N-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329.) T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME. IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

1099-K's-4684s - The Disappearing Trust Trick

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UA7728307 7 1 CPUAR 000879

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCESS TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972, TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED. YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT: PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS, PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR, THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE, OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS.); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329); 3-DISABILITY (YOU NEED NOT FILE FORM 5329); 4-DEATH (YOU NEED NOT FILE FORM 5329); 5-PROHIBITED TRANSACTIONS, 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; N-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329.); T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME. IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

4684s - The Disappearing Trust Trick

<p>ACCOUNT NUMBER: UA7728306 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>51,805.20</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>1,805.20</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>0.00</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	51,805.20	2A. TAXABLE AMOUNT.....	1,805.20	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	0.00	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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Filed with IRS in late 2008 by Danny Patilla and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

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UA7728306 7 1 CPUAR 000878

HAMILTON MAURINE P
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BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT: PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS; PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR, THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE, OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329); 3-DISABILITY (YOU NEED NOT FILE FORM 5329); 4-DEATH (YOU NEED NOT FILE FORM 5329); 5-PROHIBITED TRANSACTIONS, 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; N-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329); T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME, IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

1041-KIs-4684s - The Disappearing Trust Trick

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<p>ACCOUNT NUMBER: UA7762551 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: 470322111 RECIPIENT'S: 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>106,358.47</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>4,266.02</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>0.00</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	106,358.47	2A. TAXABLE AMOUNT.....	4,266.02	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	0.00	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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ACCOUNT NUMBER:

UA7762551 7 1 CPUAR 000881

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCESS TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972. TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED. YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT: PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS; PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR; THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE; OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS.); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329.); 3-DISABILITY (YOU NEED NOT FILE FORM 5329.); 4-DEATH (YOU NEED NOT FILE FORM 5329.); 5-PROHIBITED TRANSACTIONS; 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972.); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329.); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; N-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329.); T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME. IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

Sylvia Harrell and Sylvia Harrell - The Disappearing Trust Trick

<p>ACCOUNT NUMBER: U01126221 7 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 488-7566</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>73,721.65</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>3,721.65</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>0.00</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>0.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..7</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>0.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	73,721.65	2A. TAXABLE AMOUNT.....	3,721.65	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	0.00	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	0.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..7		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	0.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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Filed with IRS in late 2008 by Danny Catilla and Mary Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

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Fraudulent - filed with IRS in late 2008 by Danny Paula and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER:

UA8497368 4 1 CPUAR 000884

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCISE TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972, TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED. YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT. PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS, PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR, THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE, OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS). 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329). 3-DISABILITY (YOU NEED NOT FILE FORM 5329). 4-DEATH (YOU NEED NOT FILE FORM 5329). 5-PROHIBITED TRANSACTIONS; 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; N-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329); T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME, IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

IRS Form 1099-R, 2004
K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER: UA7722948 4 1	FOR INQUIRIES CALL 1 (800) 646-7592	2004 DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.
PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175	1. GROSS DISTRIBUTION..... 120,878.94 2A. TAXABLE AMOUNT..... 24,125.48 2B. TOTAL DIST: NO TAX AMT NOT DET: NO 3. LINE 2A FOR CAPITAL GAIN... 0.00 4. FEDERAL INCOME TAX WITHHELD 0.00 5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS..... 96,753.46 6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES... 0.00 7. CATEGORY OF DISTRIBUTION..4 8. OTHER..... %..... 0.00 9A. YOUR % OF TOTAL DISTRIBUTION 0% 9B. TOTAL EMPLOYEE CONTR..... 96,753.46 10. STATE INCOME TAX WITHHELD. 0.00 11. PAYER'S STATE NUMBER...	COPY C FOR RECIPIENT'S RECORDS THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R
IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593 RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112		

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IDENTIFICATION NUMBERS: PAYER'S: RECIPIENT'S: 470322111 459-20-2593 RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112		

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Fraudulent - filed with IRS in late 2008 by Danny Verilla P.O. Box 111 Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER:

UA7722948 4 1 CPUAR 000877

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCISE TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS, AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972, TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT: PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS, PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR, THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE, OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

BOX 7. THESE CODES IDENTIFY THE DISTRIBUTION YOU RECEIVED:

1-EARLY DISTRIBUTION, NO KNOWN EXCEPTION (IN MOST CASES, UNDER AGE 59 1/2) (SEE FORM 5329. FOR A ROLLOVER TO A TRADITIONAL IRA OF THE ENTIRE TAXABLE PART OF THE DISTRIBUTION, DO NOT FILE FORM 5329. SEE FORM 1040 OR 1040A INSTRUCTIONS.); 2-EARLY DISTRIBUTION EXCEPTION APPLIES (UNDER AGE 59 1/2) (YOU NEED NOT FILE FORM 5329.); 3-DISABILITY (YOU NEED NOT FILE FORM 5329.); 4-DEATH (YOU NEED NOT FILE FORM 5329.); 5-PROHIBITED TRANSACTIONS; 6-SECTION 1035 EXCHANGE (A TAX-FREE EXCHANGE OF LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACTS); 7-NORMAL DISTRIBUTION; 8-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS (AND/OR EARNINGS) TAXABLE IN 2004; 9-PS 58 COSTS (PREMIUMS PAID BY A TRUSTEE OR CUSTODIAN FOR CURRENT INSURANCE PROTECTION, TAXABLE TO YOU CURRENTLY); A-MAY BE ELIGIBLE FOR 10-YEAR TAX OPTION (SEE FORM 4972.); D-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2002; E-EXCESS ANNUAL ADDITIONS UNDER SECTION 415 (REPORT ON FORM 1040 OR 1040A ON THE LINE FOR TAXABLE PENSION OR ANNUITY INCOME. YOU NEED NOT FILE FORM 5329.); F-CHARITABLE GIFT ANNUITY; G-DIRECT ROLLOVER TO A QUALIFIED PLAN, A TAX-SHELTERED ANNUITY, A GOVERNMENTAL 457(b) PLAN, OR AN IRA. MAY ALSO INCLUDE A TRANSFER FROM A CONDUIT IRA TO A QUALIFIED PLAN; J-EARLY DISTRIBUTION FROM A ROTH IRA; L-LOANS TREATED AS DISTRIBUTIONS; M-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2004 AND RECHARACTERIZED IN 2004. REPORT ON 2004 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; P-EXCESS CONTRIBUTIONS PLUS EARNINGS/EXCESS DEFERRALS TAXABLE IN 2003; Q-ROTH IRA QUALIFIED DISTRIBUTION. YOU ARE AGE 59 1/2 OR OVER AND MEET THE 5-YEAR HOLDING PERIOD FOR A ROTH IRA; R-RECHARACTERIZED IRA CONTRIBUTION MADE FOR 2003 AND RECHARACTERIZED IN 2004. REPORT ON 2003 FORM 1040/1040A AND FORM 8606, IF APPLICABLE; S-EARLY DISTRIBUTION FROM A SIMPLE IRA IN FIRST 2 YEARS, NO KNOWN EXCEPTION (UNDER AGE 59 1/2) (MAY BE SUBJECT TO AN ADDITIONAL 25% TAX. SEE FORM 5329.) T-ROTH IRA DISTRIBUTION, EXCEPTION APPLIES. REPORT ON FORMS 1040/1040A AND 8606. YOU ARE EITHER AGE 59 1/2 OR OVER OR AN EXCEPTION (CODE 3 OR 4) APPLIES.

IF THE IRA/SEP/SIMPLE BOX IS MARKED, YOU HAVE RECEIVED A TRADITIONAL IRA, SEP, OR SIMPLE IRA DISTRIBUTION.

BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME. IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

IRAs-401Ks-4084s - The Disappearing Trust Trick

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<p>ACCOUNT NUMBER: UA8497367 4 1</p> <p>PAYER: UNITED OF OMAHA LIFE INSURANCE COMPANY MUTUAL OF OMAHA PLAZA OMAHA NE 68175</p> <p>IDENTIFICATION NUMBERS: PAYER'S: 470322111 RECIPIENT'S: 459-20-2593</p> <p>RECIPIENT: HAMILTON MAURINE P 9008 EAST DR AUSTIN TX787535112</p>	<p>FOR INQUIRIES CALL 1 (800) 646-7592</p> <table border="0"> <tr><td>1. GROSS DISTRIBUTION.....</td><td>97,480.66</td></tr> <tr><td>2A. TAXABLE AMOUNT.....</td><td>7,480.66</td></tr> <tr><td>2B. TOTAL DIST: NO TAX AMT NOT DET: NO</td><td></td></tr> <tr><td>3. LINE 2A FOR CAPITAL GAIN...</td><td>0.00</td></tr> <tr><td>4. FEDERAL INCOME TAX WITHHELD</td><td>0.00</td></tr> <tr><td>5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....</td><td>90,000.00</td></tr> <tr><td>6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...</td><td>0.00</td></tr> <tr><td>7. CATEGORY OF DISTRIBUTION..4</td><td></td></tr> <tr><td>8. OTHER..... %.....</td><td>0.00</td></tr> <tr><td>9A. YOUR % OF TOTAL DISTRIBUTION</td><td>0%</td></tr> <tr><td>9B. TOTAL EMPLOYEE CONTR.....</td><td>90,000.00</td></tr> <tr><td>10. STATE INCOME TAX WITHHELD.</td><td>0.00</td></tr> <tr><td>11. PAYER'S STATE NUMBER...</td><td></td></tr> </table>	1. GROSS DISTRIBUTION.....	97,480.66	2A. TAXABLE AMOUNT.....	7,480.66	2B. TOTAL DIST: NO TAX AMT NOT DET: NO		3. LINE 2A FOR CAPITAL GAIN...	0.00	4. FEDERAL INCOME TAX WITHHELD	0.00	5. EMPLOYEE CONTRIBUTIONS OR INSURANCE PREMIUMS.....	90,000.00	6. NET UNREALIZED APPRECIATION IN EMPLOYER'S SECURITIES...	0.00	7. CATEGORY OF DISTRIBUTION..4		8. OTHER..... %.....	0.00	9A. YOUR % OF TOTAL DISTRIBUTION	0%	9B. TOTAL EMPLOYEE CONTR.....	90,000.00	10. STATE INCOME TAX WITHHELD.	0.00	11. PAYER'S STATE NUMBER...		<p>2004</p> <p>DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.</p> <p>COPY C FOR RECIPIENT'S RECORDS</p> <p>THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE. 1099R</p>
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Fraudulent - filed with IRS in late 2008 by Danny Garcia and Myra Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

ACCOUNT NUMBER:

UA8497367 4 1 CPUAR 000883

HAMILTON MAURINE P
9008 EAST DR
AUSTIN TX 78753-5112

Instructions for Recipient

Generally, distributions from pensions, annuities, profit-sharing and retirement plans, IRAs, insurance contracts, etc., are reported to recipients on Form 1099-R.

QUALIFIED PLANS. IF YOUR ANNUITY STARTING DATE IS IN 1998, YOU MUST USE THE NEW SIMPLIFIED METHOD TO FIGURE YOUR TAXABLE AMOUNT IF YOUR PAYER DID NOT SHOW THE TAXABLE AMOUNT IN BOX 2A. SEE PUB. 575, PENSION AND ANNUITY INCOME.

IRAS. FOR DISTRIBUTIONS FROM A TRADITIONAL INDIVIDUAL RETIREMENT ARRANGEMENT (IRA), SIMPLIFIED EMPLOYEE PENSION (SEP), OR SAVINGS INCENTIVE MATCH PLAN FOR EMPLOYEES (SIMPLE), GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. THEREFORE, THE AMOUNTS IN BOXES 1 AND 2A WILL BE THE SAME MOST OF THE TIME. SEE THE FORM 1040 OR 1040A INSTRUCTIONS TO DETERMINE THE TAXABLE AMOUNT. IF YOU ARE AT LEAST AGE 70 1/2, YOU MUST TAKE MINIMUM DISTRIBUTIONS FROM YOUR IRA. IF YOU DO NOT, YOU MAY BE SUBJECT TO A 50% EXCISE TAX ON THE AMOUNT THAT SHOULD HAVE BEEN DISTRIBUTED. SEE PUB. 590, INDIVIDUAL RETIREMENT ARRANGEMENTS AND PUB 560, RETIREMENT PLANS FOR SMALL BUSINESS, FOR MORE INFORMATION ON IRAS.

ROTH IRAS. FOR DISTRIBUTION FROM A ROTH IRA, GENERALLY THE PAYER IS NOT REQUIRED TO COMPUTE THE TAXABLE AMOUNT. YOU MUST COMPUTE ANY TAXABLE AMOUNT. SEE YOUR FORM 1040 OR 1040A INSTRUCTIONS. AN AMOUNT SHOWN IN BOX 2A MAY BE TAXABLE EARNINGS ON AN EXCESS CONTRIBUTION.

LOANS TREATED AS DISTRIBUTIONS. IF YOU BORROW MONEY FROM A QUALIFIED PLAN, TAX-SHELTERED ANNUITY, OR GOVERNMENT PLAN, YOU MAY HAVE TO TREAT THE LOAN AS A DISTRIBUTION AND INCLUDE ALL OR PART OF THE AMOUNT BORROWED IN YOUR INCOME. THERE ARE EXCEPTIONS TO THIS RULE. IF YOUR LOAN IS TAXABLE, CODE L WILL BE SHOWN IN BOX 7. SEE PUB. 575.

BENEFICIARIES. IF YOU RECEIVE A PLAN DISTRIBUTION AS THE BENEFICIARY OF AN EMPLOYEE WHO DIED BEFORE AUGUST 21, 1996, YOU MAY BE ENTITLED TO A DEATH BENEFIT EXCLUSION OF UP TO \$5,000. SEE PUB. 575.

BOX 1. SHOWS THE TOTAL AMOUNT YOU RECEIVED THIS YEAR. THE AMOUNT MAY HAVE BEEN A DIRECT ROLLOVER, A TRANSFER OR CONVERSION TO A ROTH IRA, OR YOU MAY HAVE RECEIVED IT AS PERIODIC PAYMENTS, AS NONPERIODIC PAYMENTS, OR AS A TOTAL DISTRIBUTION. REPORT THIS AMOUNT ON FORM 1040 OR 1040A ON THE LINE FOR "TOTAL IRA DISTRIBUTIONS" OR "TOTAL PENSIONS AND ANNUITIES" (OR THE LINE FOR "TAXABLE AMOUNT"), WHICHEVER APPLIES, UNLESS THIS IS A LUMP-SUM DISTRIBUTION AND YOU ARE USING FORM 4972, TAX ON LUMP-SUM DISTRIBUTIONS. HOWEVER, IF YOU HAVE NOT REACHED MINIMUM RETIREMENT AGE, REPORT YOUR DISABILITY PAYMENTS ON THE LINE FOR "WAGES, SALARIES, TIPS, ETC." ALSO REPORT ON THAT LINE CORRECTIVE DISTRIBUTIONS OF EXCESS DEFERRALS, EXCESS CONTRIBUTIONS, OR EXCESS AGGREGATE CONTRIBUTIONS.

IF YOU RECEIVED A DEATH BENEFIT PAYMENT MADE BY AN EMPLOYER BUT NOT MADE FROM THE EMPLOYER'S PENSION, PROFIT-SHARING OR RETIREMENT PLAN, SEE PUB. 525, TAXABLE AND NONTAXABLE INCOME.

IF A LIFE INSURANCE, ANNUITY, OR ENDOWMENT CONTRACT HAS BEEN TRANSFERRED TAX FREE TO ANOTHER TRUSTEE OR CONTRACT ISSUER, AN AMOUNT WILL BE SHOWN IN THIS BOX AND CODE 6 WILL BE SHOWN IN BOX 7. YOU NEED NOT REPORT THIS ON YOUR TAX RETURN.

BOX 2A. THIS PART OF THE DISTRIBUTION IS GENERALLY TAXABLE. IF THERE IS NO ENTRY IN THIS BOX, THE PAYER MAY NOT HAVE ALL THE FACTS NEEDED TO FIGURE THE TAXABLE AMOUNT. IN THAT CASE, THE FIRST BOX IN BOX 2B SHOULD BE MARKED. YOU MAY WANT TO GET ONE OF THE FOLLOWING PUBLICATIONS FROM THE IRS TO HELP YOU FIGURE THE TAXABLE AMOUNT. PUB. 571, TAX-SHELTERED ANNUITY PROGRAMS FOR EMPLOYEES OF PUBLIC SCHOOLS AND CERTAIN TAX-EXEMPT ORGANIZATIONS, PUB. 575, PUB. 590, PUB. 721, TAX GUIDE TO U.S. CIVIL SERVICE RETIREMENT BENEFITS, OR PUB. 939, GENERAL RULE FOR PENSIONS AND ANNUITIES. FOR AN IRA DISTRIBUTION, SEE IRAS AND ROTH IRAS ABOVE. FOR A DIRECT ROLLOVER, ZERO SHOULD BE SHOWN, AND YOU MUST ENTER ZERO (-0-) ON THE "TAXABLE AMOUNT" LINE OF YOUR TAX RETURN.

IF THIS IS A TOTAL DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE AT LEAST AGE 59 1/2 ON THE DATE OF DISTRIBUTION (OR YOU ARE THE BENEFICIARY OF SOMEONE WHO HAD REACHED AGE 59 1/2 OR SOMEONE BORN BEFORE 1936), YOU MAY BE ELIGIBLE FOR THE 10-YEAR TAX OPTION. SEE FORM 4972 FOR MORE INFORMATION.

BOX 2B. IF THE FIRST CHECKBOX IS MARKED, THE PAYER WAS UNABLE TO DETERMINE THE TAXABLE AMOUNT, AND BOX 2A SHOULD BE BLANK UNLESS THIS IS A TRADITIONAL IRA, SEP, OR SIMPLE DISTRIBUTION. IF THE SECOND CHECKBOX IS MARKED, THE DISTRIBUTION WAS A TOTAL DISTRIBUTION THAT CLOSED OUT YOUR ACCOUNT.

BOX 3. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN AND YOU WERE BORN BEFORE 1936 (OR YOU ARE THE BENEFICIARY OF SOMEONE BORN BEFORE 1936), YOU MAY BE ABLE TO ELECT TO TREAT THIS AMOUNT AS A CAPITAL GAIN ON FORM 4972. FOR A CHARITABLE GIFT ANNUITY, REPORT AS A LONG-TERM CAPITAL GAIN ON SCHEDULE D (FORM 1040).

BOX 4. THIS IS THE AMOUNT OF FEDERAL INCOME TAX WITHHELD. INCLUDE THIS ON YOUR INCOME TAX RETURN AS TAX WITHHELD, AND, IF BOX 4 SHOWS AN AMOUNT OTHER THAN ZERO, ATTACH COPY B TO YOUR RETURN. GENERALLY, IF YOU WILL RECEIVE PAYMENTS NEXT YEAR THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS, YOU CAN CHANGE YOUR WITHHOLDING OR ELECT NOT TO HAVE INCOME TAX WITHHELD BY GIVING THE PAYER FORM W-4P, WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS.

BOX 5. GENERALLY, THIS SHOWS THE EMPLOYEE'S INVESTMENT IN THE CONTRACT (AFTER-TAX CONTRIBUTIONS), IF ANY, RECOVERED TAX FREE THIS YEAR, THE PART OF PREMIUMS PAID ON COMMERCIAL ANNUITIES OR INSURANCE CONTRACTS RECOVERED TAX FREE, OR THE NONTAXABLE PART OF A CHARITABLE GIFT ANNUITY. THIS BOX DOES NOT SHOW ANY CONTRIBUTION TO ANY IRA.

BOX 6. IF YOU RECEIVED A LUMP-SUM DISTRIBUTION FROM A QUALIFIED PLAN THAT INCLUDED SECURITIES OF THE EMPLOYER'S COMPANY, THE NET UNREALIZED APPRECIATION (NUA) (ANY INCREASE IN VALUE OF SUCH SECURITIES WHILE IN THE TRUST) IS TAXED ONLY WHEN YOU SELL THE SECURITIES UNLESS YOU CHOOSE TO INCLUDE IN YOUR GROSS INCOME THIS YEAR. SEE PUB. 575 AND THE INSTRUCTIONS FOR FORM 4972. IF YOU DID NOT RECEIVE A LUMP-SUM DISTRIBUTION, THE AMOUNT SHOWN IS THE NUA ATTRIBUTABLE TO EMPLOYEE CONTRIBUTIONS, WHICH IS NOT TAXED UNTIL YOU SELL THE SECURITIES.

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BOX 8. IF YOU RECEIVED AN ANNUITY CONTRACT AS PART OF A DISTRIBUTION, THE VALUE OF THE CONTRACT IS SHOWN. IT IS NOT TAXABLE WHEN YOU RECEIVE IT AND SHOULD NOT BE INCLUDED IN BOXES 1 AND 2A. WHEN YOU RECEIVE PERIODIC PAYMENTS FROM THE ANNUITY CONTRACT, THEY ARE TAXABLE AT THAT TIME, IF THE DISTRIBUTION IS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE OF THE ANNUITY CONTRACT DISTRIBUTED TO YOU IS ALSO SHOWN. YOU WILL NEED THIS INFORMATION IF YOU USE THE SPECIAL 5- OR 10-YEAR TAX OPTION (FORM 4972).

BOX 9a. IF A TOTAL DISTRIBUTION WAS MADE TO MORE THAN ONE PERSON, THE PERCENTAGE YOU RECEIVED IS SHOWN HERE.

BOX 9b. IF THIS IS THE FIRST YEAR OF A LIFE ANNUITY FROM A QUALIFIED PLAN OR FROM A TAX-SHELTERED ANNUITY (WITH AFTER-TAX CONTRIBUTIONS), THE AMOUNT SHOWN IS THE EMPLOYEE'S TOTAL INVESTMENT IN THE CONTRACT. IT IS USED TO COMPUTE THE TAXABLE PART OF THE DISTRIBUTION. SEE PUB. 575.

BOXES 10-15. IF STATE OR LOCAL INCOME TAX WAS WITHHELD FROM THE DISTRIBUTION, THESE BOXES MAY BE COMPLETED. BOXES 12 AND 15 MAY SHOW THE PART OF THE DISTRIBUTION SUBJECT TO STATE AND/OR LOCAL TAX.

IRS Form 1099-R - The Disappearing Trust Trick



Davila Buschhorn
& Associates, P.C.

Daniel Davila III

MPA, CPA · PFS, CRC

7207 McNeil Dr · Austin, Texas 78729-7610

512-258-6637

Fax 512-258-7699

danny@dbtxcpa.com

www.dbtxcpa.com

Your Future. Our Business

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 1041-K1s-4684s - The Disappearing Trust Trick

7207 McNeil Dr • Austin, Texas 78729-7610 • 512-258-6637 • Fax 512-258-7699

TAXPAYER'S COPY
DAVILA, BUSCHHORN & ASSOCIATES, P.C.
Certified Public Accountants

August 29, 2008

United of Omaha Life Insurance Co.
Mutual of Omaha Plaza
Omaha, NE 68175

Re: Maurine P. Hamilton UA7714948, UA8473131

Dear Peggy Rodewald

I never received the claim form as promised. Thus I have attached a Death Certificate for my mother and copies of the beneficiary page from each policy.

Please process my claim with accrued interest and send the check to:

Sylvia L. Hamilton
9008 East Dr. No. B
Austin, TX 78753

Sincerely

Sylvia L. Hamilton

Cc: Wayne Gronquist, Atty. at Law

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - No 041-K1s-4684s - The Disappearing Trust Trick



UNITED of OMAHA LIFE INSURANCE COMPANY
Mutual of Omaha Plaza
Omaha, NE 68175
402 342 7600
mutualofomaha.com

July 31, 2008

SYLVIA HAMILTON
9008 EAST DR #B
AUSTIN, TX 78753

MAURINE P HAMILTON
Coverage ID: UA7714948
UA8479131

Dear Ms. Hamilton:

Thank you for your letter. Please see the enclosed letters that were sent to in regards to your inquiry. Please call me to discuss this as soon as possible. It is important that we speak with you in order to proceed.

If you would contact me as soon as possible, please contact me at 1-800-456-0227. I will be glad to answer any questions or help in any way we can.

Sincerely,

Peggy Rodewald
Claim Specialist
Individual Life Claims

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton. No 1041-71s-4684s - The Disappearing Trust Trick

CERTIFICATION OF VITAL RECORD

CITY OF AUSTIN

STATE OF TEXAS		CERTIFICATE OF DEATH		STATE FILE NUMBER	
1. LEGAL NAME OF DECEASED (Include AKA's if any) (First, Middle, Last) Maurine P. Hamilton			(Maiden) Pulkrabek		2. DATE OF DEATH - ACTUAL OR PRESUMED October 6, 2006
3. SEX Female	4. DATE OF BIRTH Oct. 2, 1921	5. AGE-Last Birthday (Years) 85	IF UNDER 1 YR MO DATE	IF UNDER 1 DAY HOURS MIN	6. BIRTHPLACE (City & State or Foreign Country) Yoakum, Texas
7. SOCIAL SECURITY NUMBER 459-20-2593		8. MARITAL STATUS AT TIME OF DEATH <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input checked="" type="checkbox"/> Divorced <input type="checkbox"/> Never Married <input type="checkbox"/> Unknown		9. SURVIVING SPOUSE (If wife, give name prior to first marriage)	
10a. RESIDENCE STREET ADDRESS 9008 East Drive			10b. APT NO	10c. CITY OR TOWN Austin	
10d. COUNTY Travis		10e. STATE Texas		10f. ZIP CODE 78753	
11. FATHER'S NAME Joe Pulkrabek			12. MOTHER'S NAME PRIOR TO FIRST MARRIAGE Stella Brode		
13. PLACE OF DEATH (CHECK ONLY ONE)					
IF DEATH OCCURRED IN A HOSPITAL: <input type="checkbox"/> Inpatient <input type="checkbox"/> ER/Outpatient		IF DEATH OCCURRED SOMEWHERE OTHER THAN A HOSPITAL: <input type="checkbox"/> DOA <input type="checkbox"/> Hospice Facility <input type="checkbox"/> Nursing Home <input checked="" type="checkbox"/> Decedent's Home <input type="checkbox"/> Other (Specify)			
14. COUNTY OF DEATH Travis		15. CITY/TOWN, ZIP (If outside city limits, give precinct no) Austin, 78753		16. FACILITY NAME (If not institution, give street address) 9008 East Drive	
17. INFORMANT'S NAME & RELATIONSHIP TO DECEASED Sylvia Hamilton Daughter			18. MAILING ADDRESS OF INFORMANT (Street and Number, City, State, Zip Code) 9008 East Drive, Austin, Texas 78753		
19. METHOD OF DISPOSITION <input type="checkbox"/> Burial <input checked="" type="checkbox"/> Cremation <input type="checkbox"/> Donation <input type="checkbox"/> Entombment <input type="checkbox"/> Removal From State <input type="checkbox"/> Other (Specify)		20. SIGNATURE AND LICENSE NUMBER OF FUNERAL DIRECTOR OR PERSON ACTING AS SUCH S. B. J. #112525		21. Section _____ Block _____ Lot _____ Space _____	
22. PLACE OF DISPOSITION (Name of cemetery, crematory, other place) Onion Creek Memorial Park			23. LOCATION (City/Town, and State) Austin, Texas		
24. NAME OF FUNERAL FACILITY All Faiths Funeral Services			25. COMPLETE ADDRESS OF FUNERAL FACILITY (Street and Number, City, State, Zip Code) 8507 N. IH-35, Austin, Texas 78753		
26. CERTIFIER (Check only one): <input type="checkbox"/> Certifying Physician - To the best of my knowledge, death occurred due to the cause(s) and manner stated. <input checked="" type="checkbox"/> Medical Examiner/Justice of the Peace - On the basis of examination, and/or investigation, in my opinion, death occurred at the time, date, and place, and due to the cause(s) and manner stated.					
27. SIGNATURE OF CERTIFIER <i>(Signature)</i>		28. DATE CERTIFIED (Mo/Day/Yr) 10/13/2006		29. LICENSE NUMBER K8123	
30. TIME OF DEATH (Actual or presumed) 1:27 A.M.			31. PRINTED NAME, ADDRESS OF CERTIFIER (Street and Number, City, State, Zip Code) David Dolinak, M.D. PO Box 1748, Austin, Texas 78767		
32. TITLE OF CERTIFIER Chief M.E.			33. PART 1: ENTER THE CHAIN OF EVENTS - DISEASES, INJURIES, OR COMPLICATIONS - THAT DIRECTLY CAUSED THE DEATH. DO NOT ENTER TERMINAL EVENTS SUCH AS CARDIAC ARREST, RESPIRATORY ARREST, OR VENTRICULAR FIBRILLATION WITHOUT SHOWING THE ETIOLOGY. DO NOT ABBREVIATE. ENTER ONLY ONE CAUSE ON EACH LINE.		
IMMEDIATE CAUSE (Final disease or condition resulting in death) a. Atherosclerotic and hypertensive cardiovascular disease		Due to (or as a consequence of): b. _____		Approximate interval: Onset to death Years	
Sequentially list conditions, if any, leading to the cause listed on line a. Enter the UNDERLYING CAUSE (disease or injury that initiated the events resulting in death) LAST. c. _____		Due to (or as a consequence of): d. _____			
PART 2: ENTER OTHER SIGNIFICANT CONDITIONS CONTRIBUTING TO DEATH BUT NOT RESULTING IN THE UNDERLYING CAUSE GIVEN IN PART 1. Diabetes mellitus			34. WAS AN AUTOPSY PERFORMED? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
35. WERE AUTOPSY FINDINGS AVAILABLE TO COMPLETE THE CAUSE OF DEATH? <input type="checkbox"/> Yes <input type="checkbox"/> No					
36. MANNER OF DEATH <input checked="" type="checkbox"/> Natural <input type="checkbox"/> Accident <input type="checkbox"/> Suicide <input type="checkbox"/> Homicide <input type="checkbox"/> Pending investigation <input type="checkbox"/> Could not be determined		37. DID TOBACCO CONTRIBUTE TO DEATH? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Probably <input checked="" type="checkbox"/> Unknown		38. IF FEMALE: <input checked="" type="checkbox"/> Not pregnant within past year <input type="checkbox"/> Pregnant at time of death <input type="checkbox"/> Not pregnant, but pregnant within 42 days of death <input type="checkbox"/> Not pregnant, but pregnant 43 days to 1 year before death <input type="checkbox"/> Unknown if pregnant within the past year	
39. IF TRANSPORTATION INJURY, SPECIFY: <input type="checkbox"/> Driver/Operator <input type="checkbox"/> Passenger <input type="checkbox"/> Pedestrian <input type="checkbox"/> Other (Specify)		40a. DATE OF INJURY (Mo/Day/Yr)		40b. TIME OF INJURY	
40c. INJURY AT WORK? <input type="checkbox"/> Yes <input type="checkbox"/> No		40d. PLACE OF INJURY (e.g., Decedent's home; construction site, restaurant, wooded area)			
40e. LOCATION (Street and Number, City, State, Zip Code)			40f. COUNTY OF INJURY		
41. DESCRIBE HOW INJURY OCCURRED					
42a. REGISTRAR FILE NO 02-03634		42b. DATE RECEIVED BY LOCAL REGISTRAR OCT 16 2006		42c. REGISTRAR Raguel Moreno	

TEXAS DEPARTMENT OF STATE HEALTH SERVICES - VITAL STATISTICS UNIT
 WARNING: The penalty for knowingly making a false statement in this form can be 2-10 years in prison and a fine of up to \$10,000. (Health and Safety Code, Sec. 195, 1989)
 VS-112 REV 1/2006



S393442

This is to certify that this is a true and correct reproduction of the original record as recorded in this office. Issued under authority of Section 191.051, Health & Safety Code.



ISSUED OCT 17 2006

Raguel Moreno
Local Registrar



WARNING: IT IS ILLEGAL TO DUPLICATE THIS COPY.

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton and Sylvia Hamilton - No 24-K1s-4604s - The Insurance Trust Trick

Premium: Amount Collected: \$ 0 - Planned Amount: \$ 6429.66
 Method of Payment: Monthly Bank Transfer Quarterly Semiannually Annual PRD
 Death Benefit Options: Option 1: Accumulation Value Included in Specified Amount
 Option 2: Accumulation Value In Addition to Specified Amount
 Universal Life Only
 Riders: Waiver of Premium Children's Rider Spouse Rider Other (Please Specify)
 Plan: _____
 Amount/Units: _____
 Accidental Death Benefit Additional Insured Rider
 Amounts/Units/Plans: _____
 Amount: _____
 Amount: 100,000

SECTION C PLAN INFORMATION and OTHER COVERAGE

Spouse Occupation: _____ Birthplace (state): _____

First Name, Middle Initial, Last Name	Social Security Number	Relationship to Proposed Insured	Birth Date	Age	Sex	Ht.	Wt.

SECTION B COMPLETE ONLY IF SPOUSE/CHILDREN ARE PROPOSED FOR INSURANCE

SPOUSE/CHILDREN
 Beneficiary/Relationship: Alan Hamilton - son SSN/TIN: 463-76-6490
 Beneficiary/Relationship: Sylvia Hamilton - daughter SSN/TIN: 449-84-1932
 Owner's Name (if different than Proposed Insured): _____
 Owner's Address: _____
 Home Phone Number: (512) 836-1930 Best Time to Call: Morning
 Occupation: Retired
 Name of Firm or Employer: _____
 Height: 5'2" Weight: 168 Driver's License Number: 04546937 State of Issue: TX
 Sex: Male Female Date of Birth: 10/2/1921 Age: 78 Place of Birth: TX
 Date of arrival in the United States: _____
 Are you and all persons proposed for insurance a citizen(s) of the United States? Yes No If "No", do all persons proposed for insurance have an alien registration receipt "Permanent Visa"? Yes No If "Yes", Permanent Visa _____
 Mailing Address for Premium Notice: Same
 Legal Residence Address: 9902 Childress Dr. Austin, TX 78753
 Name: Maurine P. Hamilton Social Security # 459 20 2593

SECTION A PROPOSED COVERED PERSON(S)

Mutual of Omaha Life Insurance Company
 Omaha, Nebraska 68175
 LIFE INSURANCE APPLICATION ADULT LIFE JUVENILE LIFE
 Replacement/Conversion Addition to Existing
 New Business

Life Insurance Application

BRIAN P. DUDLEY 303197

United of Omaha Life Insurance Company
Mutual of Omaha Plaza
Omaha, NE 68175
M. FARGNOLI DIV. 1530 B. WITTEN
 ADULT LIFE JUVENILE LIFE
 New Business Replacement/Conversion Addition to Existing

Section A Proposed Covered Person(s)

1 Name: Maureen P. Hamilton Social Security # 459-20-2593
2 Legal Residence Address: 9902 Childress Drive Austin, TX 78753
3 Mailing Address for Premium Notice: Same
4 Are you and all persons proposed for insurance have an alien registration receipt "Permanent Visa"? Yes No
5 If "Yes," Permanent Visa No.:
6 Sex: Male Female Date of Birth: 10/2/21 Age: 80 Place of Birth: TX
7 Height: 5'2 Weight: 135 Driver's License Number: 04546937 State of Issue: TX
8 Name of Firm or Employer: Retired Duties:
9 Home Phone Number: (SUA) 836-1930 Best Time to Call: 6:00 pm
10 Owner's Name (if different than Proposed Insured):
11 Owner's Social Security Number or Tax I.D. Number:
12 Beneficiary/Relationship: Alan Hamilton - son SSN/TIN: 463-76-6490
13 Contingent Beneficiary/Relationship: Sylvia Hamilton - Daughter SSN/TIN: 449-84-1932

Section B Spouse/Children

Complete Only If Spouse/Children Are Proposed for Insurance.

First Name, Middle Initial, Last Name	Social Security Number	Relationship to Proposed Insured	Birth Date Mo/Day/Yr	Age	Sex	Ht.	Wt.

Section C Plan Information and Other Coverage

Plan(s) of Insurance: Priority Ultra UL NT/50% Amount: 250,000

Riders: Waiver of Premium Children's Rider Spouse Rider Other (Please Specify)
Amounts/Units/Plans: N/A
Accidental Death Benefit: Amounts/Units/Plans:
Additional Insured Rider: Amount/Units:
Plan: _____

Death Benefit Options: Option 1: Accumulation Value Included in Specified Amount. Option 2: Accumulation Value in Addition to Specified Amount.
Method of Payment: Monthly Bank Transfer Quarterly Semiannually Annual PRD
Premium: Amount Collected: \$ 18,785.53 Planned Amount: \$ _____

Have you had or did you intend to have any life or annuity policy replaced, exchanged, converted, reduced, issued or subject to borrowing because of this application? Yes No
If "Yes," list companies and policy numbers 1035 Exchange Yes No

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton No 104-11646845 The Disappearing Trust Trick

TAXPAYER'S COPY

DAVILA, BUSCHHORN & ASSOCIATES, P.C.
Certified Public Accountants

August 29, 2008

American Heritage Life Insurance Co.
Long Term Care Administration
8545 126th Ave N., Suite 200
Largo, FL. 33773-1502

Re: Maurine P. Hamilton, 70103647

Dear Sir

Please refund all unearned premium on the above referenced LT care policy. Mrs. Hamilton died on October 6, 2006.

Please mail the refund to the address of record.

Sincerely

Sylvia Hamilton

Attachments: Death Certificate
Premium Notice

Fraudulent-filed with IRS in late 2008 by Danny Davila and Sylvia Hamilton - IR 1041-K1s-4684s - The Disappearing Trust Trick

AMERICAN HERITAGE LIFE INSURANCE COMPANY
LONG TERM CARE ADMINISTRATION
8545 126TH AVE N STE 200
LARGO FL 33773-1502

Run Date: 01/31/2007
INSURED: MAURINE P HAMILTON

Policy/Certificate #: 70103647
Date Due: 01/18/2007
Months Covered: 12
Premium Due: \$ 9,006.19

MAURINE P HAMILTON
9008 EAST DR
AUSTIN TX 78753

2ND PREMIUM NOTICE

For Customer Service Inquiries:
Call Toll Free At 1-800-780-3724,
Or Write To Us At The Above Address.

Submit Claim(s) To:

AMERICAN HERITAGE LIFE INSURANCE COMPANY
PO BOX 10811
CLEARWATER FL 33757-8811

PLEASE RETAIN THE ABOVE SECTION FOR YOUR RECORDS

PLEASE DETACH THIS SECTION AND RETURN WITH REMITTANCE

MAURINE P HAMILTON
9008 EAST DR
AUSTIN TX 78753

2ND PREMIUM NOTICE
INSURED: MAURINE P HAMILTON
Policy/Certificate #: 70103647
Date Due: 01/18/2007
Months Covered: 12
Premium Due: \$ 9,006.19

Phone (512) 834-4309
Please record any address or
phone changes above.

AMERICAN HERITAGE LIFE INSURANCE COMPANY
PO BOX 861846
ORLANDO FL 32886-1846



CERTIFICATION OF VITAL RECORD

CITY OF AUSTIN

STATE OF TEXAS CERTIFICATE OF DEATH STATE FILE NUMBER

1. LEGAL NAME OF DECEASED (include AKA's if any) (First, Middle, Last) (Maiden) 2. DATE OF DEATH - ACTUAL OR PRESUMED
 Maurine P. Hamilton Pulkrabek October 6, 2006

3. SEX 4. DATE OF BIRTH 5. AGE-Last Birthday 6. BIRTHPLACE (City & State or Foreign Country)
 Female Oct. 2, 1921 85 Yoakum, Texas

7. SOCIAL SECURITY NUMBER 8. MARITAL STATUS AT TIME OF DEATH 9. SURVIVING SPOUSE (If wife, give name prior to first marriage)
 459-20-2593 Married Widowed Divorced Never Married Unknown

10a. RESIDENCE STREET ADDRESS 10b. APT NO 10c. CITY OR TOWN
 9008 East Drive Austin

10d. COUNTY 10e. STATE 10f. ZIP CODE 10g. INSIDE CITY LIMITS?
 Travis Texas 78753 Yes No

11. FATHER'S NAME 12. MOTHER'S NAME PRIOR TO FIRST MARRIAGE
 Joe Pulkrabek Stella Brode

13. PLACE OF DEATH (CHECK ONLY ONE)
 Inpatient ER/Outpatient DOA Hospice Facility Nursing Home Decedent's Home Other (Specify)

14. COUNTY OF DEATH 15. CITY/TOWN, ZIP (If outside city limits, give precinct no) 16. FACILITY NAME (If not institution, give street address)
 Travis Austin, 78753 9008 East Drive

17. INFORMANT'S NAME & RELATIONSHIP TO DECEASED 18. MAILING ADDRESS OF INFORMANT (Street and Number, City, State, Zip Code)
 Sylvia Hamilton Daughter 9008 East Drive, Austin, Texas 78753

19. METHOD OF DISPOSITION 20. SIGNATURE AND LICENSE NUMBER OF FUNERAL DIRECTOR OR PERSON ACTING AS SUCH 21. Unknown
 Burial Cremation Donation Entombment Removal From State Other (Specify) S B 86 #112525

22. PLACE OF DISPOSITION (Name of cemetery, crematory, other place) 23. LOCATION (City/Town, and State)
 Onion Creek Memorial Park Austin, Texas

24. NAME OF FUNERAL FACILITY 25. COMPLETE ADDRESS OF FUNERAL FACILITY (Street and Number, City, State, Zip Code)
 All Faiths Funeral Services 8507 N. IH-35, Austin, Texas 78753

26. CERTIFIER (Check only one):
 Certifying Physician - To the best of my knowledge, death occurred due to the cause(s) and manner stated.
 Medical Examiner/Justice of the Peace - On the basis of examination, and/or investigation, in my opinion, death occurred at the time, date, and place, and due to the cause(s) and manner stated.

27. SIGNATURE OF CERTIFIER 28. DATE CERTIFIED (Mo/Day/Yr) 29. LICENSE NUMBER 30. TIME OF DEATH (Actual or presumed)
 (Signature) 10/13/2006 X8123 1:27 A.M.

31. PRINTED NAME, ADDRESS OF CERTIFIER (Street and Number, City, State, Zip Code) 32. TITLE OF CERTIFIER
 David Dolinak, M.D. PO Box 1748, Austin, Texas 78767 Chief M.E.

33. PART 1. ENTER THE CHAIN OF EVENTS - DISEASES, INJURIES, OR COMPLICATIONS - THAT DIRECTLY CAUSED THE DEATH. DO NOT ENTER TERMINAL EVENTS SUCH AS CARDIAC ARREST, RESPIRATORY ARREST, OR VENTRICULAR FIBRILLATION WITHOUT SHOWING THE ETIOLOGY. DO NOT ABBREVIATE. ENTER ONLY ONE CAUSE ON EACH LINE. Approximate interval: Onset to death
 IMMEDIATE CAUSE (Final disease or condition resulting in death) a. Atherosclerotic and hypertensive cardiovascular disease Years
 Due to (or as a consequence of) b. disease
 Sequentially list conditions, if any, leading to the cause listed on line a. Enter the UNDERLYING CAUSE (disease or injury that initiated the events resulting in death) LAST. Due to (or as a consequence of) c. Due to (or as a consequence of) d.

PART 2. ENTER OTHER SIGNIFICANT CONDITIONS CONTRIBUTING TO DEATH BUT NOT RESULTING IN THE UNDERLYING CAUSE GIVEN IN PART 1. 34. WAS AN AUTOPSY PERFORMED? Yes No
 Diabetes mellitus 35. WERE AUTOPSY FINDINGS AVAILABLE TO COMPLETE THE CAUSE OF DEATH? Yes No

36. MANNER OF DEATH 37. DID TOBACCO CONTRIBUTE TO DEATH? 38. IF FEMALE:
 Natural Yes No Not pregnant within past year
 Accident No Pregnant at time of death
 Suicide Probably Not pregnant, but pregnant within 42 days of death
 Homicide Unknown Not pregnant, but pregnant 43 days to 1 year before death
 Pending Investigation Could not be determined

39. IF TRANSPORTATION INJURY, SPECIFY:
 Driver/Operator
 Passenger
 Pedestrian
 Other (Specify)

40a. DATE OF INJURY (Mo/Day/Yr) 40b. TIME OF INJURY 40c. INJURY AT WORK? Yes No 40d. PLACE OF INJURY (e.g., Decedent's home, construction site, restaurant, wooded area)

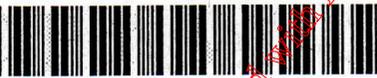
40e. LOCATION (Street and Number, City, State, Zip Code) 40f. COUNTY OF INJURY

41. DESCRIBE HOW INJURY OCCURRED

42a. REGISTRAR FILE NO 42b. DATE RECEIVED BY LOCAL REGISTRAR 42c. REGISTRAR
 02-03634 OCT 16 2006 Raguuel Moreno

TEXAS DEPARTMENT OF STATE HEALTH SERVICES - VITAL STATISTICS UNIT
 WARNING: The penalty for knowingly making a false entry on this form can be 2-10 years in prison and a fine of up to \$10,000. (Health and Safety Code, Sec. 195, 199B)
 VS-112 REV 1/2006

COPY FILED IN THE PUBLIC RECORDS - The Disappearing Trust Trick



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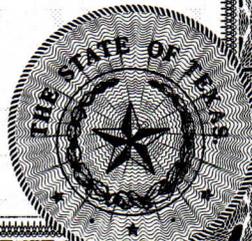
S393444

This is to certify that this is a true and correct reproduction of the original record as recorded in this office. Issued under authority of Section 191.051, Health & Safety Code.



ISSUED OCT 17 2006

Raguuel Moreno
 Local Registrar



WARNING: IT IS ILLEGAL TO DUPLICATE THIS COPY.

ANY ALTERATION OR ERASURE VOIDS THIS CERTIFICATE