

For the year Jan. 1-Dec. 31, 2013, or other tax year beginning , 2013, ending , 20

See separate instructions.

Your first name and initial
MARIANNE D.

Last name
WILLIAMSON

Your social security number
[REDACTED]

If a joint return, spouse's first name and initial

Last name

Spouse's social security number
[REDACTED]

Home address (number and street). If you have a P.O. box, see instructions.
[REDACTED]

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below.
[REDACTED]

Foreign country name

Foreign province/state/county

Foreign postal code

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.
☐ You ☐ Spouse

Filing Status

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). If the qualifying person is a child but not your dependent, enter this child's name here. ▶

5 ☐ Qualifying widow(er) with dependent child

Exemptions

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

b ☐ Spouse

c Dependents:

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> If child under age 17 qualifying for child tax credit
[REDACTED]	[REDACTED]	[REDACTED]	DAUGHTER	

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

Boxes checked on 6a and 6b **1**

No. of children on 6c who:
• lived with you
• did not live with you due to divorce or separation (see instructions)

Dependents on 6c not entered above **1**

Add numbers on lines above ▶ **2**

d Total number of exemptions claimed

Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2

8a Taxable interest. Attach Schedule B if required

b Tax-exempt interest. Do not include on line 8a

9a Ordinary dividends. Attach Schedule B if required

b Qualified dividends

10 Taxable refunds, credits, or offsets of state and local income taxes

11 Alimony received

12 Business income or (loss). Attach Schedule C or C-EZ

13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐

14 Other gains or (losses). Attach Form 4797

15a IRA distributions

16a Pensions and annuities

17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

18 Farm income or (loss). Attach Schedule F

19 Unemployment compensation

20a Social security benefits

21 Other income. List type and amount

22 Combine the amounts in the far right column for lines 7 through 21. This is your total income

Line	Amount
7	
8a	2,330.
b	5,631.
9a	24,570.
b	STMT 5
10	0.
11	
12	700,545.
13	-3,000.
14	19.
15a	
15b	
16a	
16b	
17	-19.
18	
19	
20a	
20b	
21	
22	724,445.

Adjusted Gross Income

23 Educator expenses

24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ

25 Health savings account deduction. Attach Form 8889

26 Moving expenses. Attach Form 3903

27 Deductible part of self-employment tax. Attach Schedule SE

28 Self-employed SEP, SIMPLE, and qualified plans

29 Self-employed health insurance deduction

30 Penalty on early withdrawal of savings

31a Alimony paid b Recipient's SSN ▶

32 IRA deduction

33 Student loan interest deduction

34 Tuition and fees. Attach Form 8917

35 Domestic production activities deduction. Attach Form 8903

36 Add lines 23 through 35

37 Subtract line 36 from line 22. This is your adjusted gross income

Line	Amount
23	
24	
25	
26	
27	16,430.
28	
29	21,911.
30	
31a	
32	
33	
34	
35	
36	38,341.
37	686,104.

Tax and Credits

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

• All others:
Single or Married filing separately, \$6,100
Married filing jointly or Qualifying widow(er), \$12,200
Head of household, \$8,950

38	Amount from line 37 (adjusted gross income)	38	686,104.
39a	Check <input type="checkbox"/> You were born before January 2, 1949, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1949, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a <input type="checkbox"/> 39b <input type="checkbox"/>		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here <input type="checkbox"/>		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	88,171.
41	Subtract line 40 from line 38	41	597,933.
42	Exemptions. If line 38 is \$150,000 or less, multiply \$3,900 by the number on line 6d. Otherwise, see inst.	42	0.
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	597,933.
44	Tax. Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/>	44	186,099.
45	Alternative minimum tax. Attach Form 6251	45	0.
46	Add lines 44 and 45	46	186,099.
47	Foreign tax credit. Attach Form 1116 if required	47	82.
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit. Attach Schedule 8812, if required	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input checked="" type="checkbox"/> 8801 c <input type="checkbox"/>	53	1,032.
54	Add lines 47 through 53. These are your total credits	54	1,114.
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	184,985.

Other Taxes

56	Self-employment tax. Attach Schedule SE	56	32,860.
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59a	Household employment taxes from Schedule H	59a	
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Taxes from: a <input checked="" type="checkbox"/> Form 8959 b <input checked="" type="checkbox"/> Form 8960 c <input type="checkbox"/> Inst.; enter code(s)	60	4,843.
61	Add lines 55 through 60. This is your total tax	61	222,688.

Payments

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	
63	2013 estimated tax payments and amount applied from 2012 return	63	235,312.
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election	64b	
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	7,500.
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	242,812.

Refund

Direct deposit? See instructions.

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	20,124.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a	
b	Routing number <input type="text"/>	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number <input type="text"/>		
75	Amount of line 73 you want applied to your 2014 estimated tax	75	20,070.

Amount You Owe

76	Amount you owe. Subtract line 72 from line 61. For details on how to pay, see instructions	76	
77	Estimated tax penalty (see instructions)	77	54.

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? ☒ Yes. Complete below. ☐ No

Designee's name <input type="text"/>	Phone no. <input type="text"/>	Personal identification number (PIN) <input type="text"/>
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Sign Here

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

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature <input type="text"/>	Date <input type="text"/>	Your occupation AUTHOR / LECTURER	Daytime phone number <input type="text"/>
Spouse's signature. If a joint return, both must sign. <input type="text"/>	Date <input type="text"/>	Spouse's occupation <input type="text"/>	If the IRS sent you an Identity Protection PIN, enter it here <input type="text"/>

Print/Type preparer's name <input type="text"/>	Preparer's signature <input type="text"/>	Date <input type="text"/>	Check <input type="checkbox"/> if self-employed	PTIN <input type="text"/>
Paid Preparer Use Only	Firm's name <input type="text"/>	Firm's EIN <input type="text"/>	Phone no. <input type="text"/>	
	Firm's address <input type="text"/>			

**SCHEDULE A
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on Form 1040**Itemized Deductions****Information about Schedule A and its separate instructions is at www.irs.gov/schedulea.
Attach to Form 1040.**

OMB No. 1545-0074

2013Attachment
Sequence No. **07**

Your social security number

MARIANNE D. WILLIAMSON

Medical and Dental Expenses	Caution. Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see instructions) SEE STATEMENT 9	1	9,011.
2	Enter amount from Form 1040, line 38 2 686,104.	2	
3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1949, multiply line 2 by 7.5% (.075) instead	3	68,610.
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	0.
Taxes You Paid	5 State and local (check only one box): a <input checked="" type="checkbox"/> Income taxes, or SEE STATEMENT 8 b <input type="checkbox"/> General sales taxes	5	85,641.
	6 Real estate taxes (see instructions)	6	
	7 Personal property taxes	7	
	8 Other taxes. List type and amount	8	
	9 Add lines 5 through 8	9	85,641.
Interest You Paid	10 Home mortgage interest and points reported to you on Form 1098	10	
	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address	11	
Note. Your mortgage interest deduction may be limited (see instructions).	12 Points not reported to you on Form 1098. See instructions for special rules	12	
	13 Mortgage insurance premiums (see instructions)	13	
	14 Investment interest. Attach Form 4952 if required. (See instructions.)	14	
	15 Add lines 10 through 14	15	
Gifts to Charity	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	16	14,863.
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	17	
	18 Carryover from prior year	18	
	19 Add lines 16 through 18	19	14,863.
Casualty and Theft Losses	20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)	20	
Job Expenses and Certain Miscellaneous Deductions	21 Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.)	21	
	22 Tax preparation fees	22	2,500.
	23 Other expenses - investment, safe deposit box, etc. List type and amount UBS # 9,178.	23	9,178.
	24 Add lines 21 through 23	24	11,678.
	25 Enter amount from Form 1040, line 38 25 686,104.	25	
	26 Multiply line 25 by 2% (.02)	26	13,722.
	27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27	0.
Other Miscellaneous Deductions	28 Other - from list in instructions. List type and amount	28	
Total Itemized Deductions	29 Is Form 1040, line 38, over \$150,000? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input checked="" type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	29	88,171.
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here		

SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on return

Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.

▶ Information about Schedule B (Form 1040A or 1040) and its instructions is at www.irs.gov/scheduleb.

OMB No. 1545-0074

2013

Attachment
Sequence No. **08**

Your social security number

MARIANNE D. WILLIAMSON

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 instructions and list this interest first. Also, show that buyer's social security number and address ▶

C&D LLP

UNION BANK. N.A

UBS #

Amount

881.

46.

1,403.

1

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
- 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 1040A, or Form 1040, line 8a ▶

2

2,330.

3

4

2,330.

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

Amount

Part II
Ordinary Dividends

- 5** List name of payer ▶

UBS #

UBS #

UBS #

59.

17,784.

6,795.

5

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.

SUBTOTAL FOR LINE 5

TAX-EXEMPT DIVIDENDS **SEE STATEMENT 11**

24,638.

-68.

- 6** Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶

6

24,570.

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; **(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 2013, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions
- If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), formerly TD F 90-22.1 to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements

Yes **No**

X

- b** If you are required to file FinCen Form 114, enter the name of the foreign country where the financial account is located ▶

- 8** During 2013, 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 instructions

X

327501
09-30-13

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

Schedule B (Form 1040A or 1040) 2013

**SCHEDULE C
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)**Profit or Loss From Business**

(Sole Proprietorship)

▶ For information on Schedule C and its instructions, go to www.irs.gov/schedulec.
▶ Attach to Form 1040, 1040NR, or 1041; partnerships generally must file Form 1065.

OMB No. 1545-0074

2013Attachment
Sequence No. **09**

Name of proprietor

MARIANNE D. WILLIAMSON

Social security number (SSN)

A Principal business or profession, including product or service (see instructions)**AUTHOR/LECTURER****B** Enter code from instructions▶ **711510****C** Business name. If no separate business name, leave blank.**MARIANNE WILLIAMSON****D** Employer ID number (EIN), (see instr.)**E** Business address (including suite or room no.) ▶

City, town or post office, state, and ZIP code

F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ▶**G** Did you "materially participate" in the operation of this business during 2013? If "No," see instructions for limit on losses ☒ Yes ☐ No**H** If you started or acquired this business during 2013, check here ☐**I** Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions) ☒ Yes ☐ No**J** If "Yes," did you or will you file required Forms 1099? ☒ Yes ☐ No**Part I Income**

1 Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	1	1,365,408.
2 Returns and allowances	2	
3 Subtract line 2 from line 1	3	1,365,408.
4 Cost of goods sold (from line 42)	4	221,308.
5 Gross profit. Subtract line 4 from line 3	5	1,144,100.
6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	6	
7 Gross income. Add lines 5 and 6	7	1,144,100.

Part II Expenses**Enter expenses for business use of your home only on line 30.**

8 Advertising	8	2,424.	18 Office expense	18	7,109.
9 Car and truck expenses (see instructions) STMT 12	9	4,794.	19 Pension and profit-sharing plans	19	
10 Commissions and fees	10	67,115.	20 Rent or lease (see instructions):		
11 Contract labor (see instructions)	11		a Vehicles, machinery, and equipment	20a	
12 Depletion	12		b Other business property	20b	2,179.
13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13	1,420.	21 Repairs and maintenance	21	
14 Employee benefit programs (other than on line 19)	14		22 Supplies (not included in Part III)	22	
15 Insurance (other than health)	15	17,608.	23 Taxes and licenses	23	3,056.
16 Interest:			24 Travel, meals, and entertainment:		
a Mortgage (paid to banks, etc.)	16a		a Travel	24a	30,250.
b Other	16b		b Deductible meals and entertainment (see instructions)	24b	15,032.
17 Legal and professional services	17	17,503.	25 Utilities	25	
28 Total expenses before expenses for business use of home. Add lines 8 through 27a	28	432,083.	26 Wages (less employment credits)	26	21,808.
29 Tentative profit or (loss). Subtract line 28 from line 7	29	712,017.	27 a Other expenses (from line 48)	27a	241,785.
30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). Simplified method filers only: enter the total square footage of: (a) your home: _____ and (b) the part of your home used for business: _____. Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30	30	11,472.	b Reserved for future use	27b	
31 Net profit or (loss). Subtract line 30 from line 29. ● If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2 . (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3 . ● If a loss, you must go to line 32.	31	700,545.			
32 If you have a loss, check the box that describes your investment in this activity (see instructions). ● If you checked 32a, enter the loss on both Form 1040, line 12 , (or Form 1040NR, line 13) and on Schedule SE, line 2 . (If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on Form 1041, line 3 . ● If you checked 32b, you must attach Form 6198 . Your loss may be limited.			32a <input type="checkbox"/> All investment is at risk.		
			32b <input type="checkbox"/> Some investment is not at risk.		

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Schedule C (Form 1040) 2013

33 Method(s) used to value closing inventory: **a** ☐ Cost **b** ☐ Lower of cost or market **c** ☐ Other (attach explanation)

34 Was there any change in determining quantities, costs, or valuations between opening and closing inventory?
If "Yes," attach explanation ☐ Yes ☐ No

35	Inventory at beginning of year. If different from last year's closing inventory, attach explanation	35	
36	Purchases less cost of items withdrawn for personal use	36	31,419.
37	Cost of labor. Do not include any amounts paid to yourself	37	40,816.
38	Materials and supplies	38	2,352.
39	Other costs SEE STATEMENT 14	39	146,721.
40	Add lines 35 through 39	40	221,308.
41	Inventory at end of year	41	
42	Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4	42	221,308.

43 When did you place your vehicle in service for business purposes? (month, day, year) ▶ / /

44 Of the total number of miles you drove your vehicle during 2013, enter the number of miles you used your vehicle for:

a Business _____ **b** Commuting _____ **c** Other _____

45 Was your vehicle available for personal use during off-duty hours? ☐ Yes ☐ No

46 Do you (or your spouse) have another vehicle available for personal use? ☐ Yes ☐ No

47 a Do you have evidence to support your deduction? ☐ Yes ☐ No

b If "Yes," is the evidence written? ☐ Yes ☐ No

SEE STATEMENT 13	241,785.
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48	Total other expenses. Enter here and on line 27a	48	241,785.
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**SCHEDULE D
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)**Capital Gains and Losses**

▶ Attach to Form 1040 or Form 1040NR.

▶ Information about Schedule D and its separate instructions is at www.irs.gov/scheduled.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.

OMB No. 1545-0074

2013Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

MARIANNE D. WILLIAMSON**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	33,345.	27,293.		6,052.
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824			4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions			6	()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	6,052.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	44,041.	43,254.		787.
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	27,527.	24,494.		3,033.
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824			11	
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	
13 Capital gain distributions SEE STATEMENT 15			13	11,922.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	(354,416.)
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on page 2			15	<338,674.>

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

Schedule D (Form 1040) 2013

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	<332,622.>
<ul style="list-style-type: none">• If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below.• If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.• If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22.			
17	Are lines 15 and 16 both gains? <input type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.		
18	Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions	18	
19	Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions	19	
20	Are lines 18 and 19 both zero or blank? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below. <input type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of: <div style="display: flex; align-items: center;"><div style="margin-right: 10px;"><ul style="list-style-type: none">• The loss on line 16 or• (\$3,000), or if married filing separately, (\$1,500)</div><div style="font-size: 3em; margin-right: 10px;">}</div><div style="border-bottom: 1px solid black; padding-bottom: 2px;">SEE STATEMENT 16</div></div> Note. When figuring which amount is smaller, treat both amounts as positive numbers.	21	(3,000.)
22	Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b? <input checked="" type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). <input type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.		

Schedule D (Form 1040) 2013

Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

2013

Attachment
Sequence No. **12A**

► **Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.**

Name(s) shown on return

Social security number or taxpayer identification no.

MARIANNE D. WILLIAMSON

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box A, B, or C below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part I	Short-Term. Transactions involving capital assets you held one year or less are short-term. For long-term transactions, see page 2.
---------------	--

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☒ (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ (B) Short-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☐ (C) Short-term transactions not reported to you on Form 1099-B

[illegible]

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. (Name and SSN or taxpayer identification no. not required if shown on other side.)

Social security number or taxpayer identification no.

MARIANNE D. WILLIAMSON

Most brokers issue their own substitute statement instead of using Form 1099-B. They also may provide basis information (usually your cost) to you on the statement even if it is not reported to the IRS. Before you check Box D, E, or F below, determine whether you received any statement(s) and, if so, the transactions for which basis was reported to the IRS. Brokers are required to report basis to the IRS for most stock you bought in 2011 or later.

Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

☒ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

☐ (F) Long-term transactions not reported to you on Form 1099-B

	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see Column (e) in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s)	(g) Amount of adjustment	
	ALLIANZ SE 8.375% PERPETUAL, CALLABLE	01/23/12	06/15/13	18,750.	19,618.			<868.>
	ING GROEP NV CUMULATIVE 8.500% PREFERRED	01/23/12	12/15/13	20,625.	20,048.			577.
	PROCTER & GAMBLE CO	01/27/11	05/24/13	3,029.	2,351.			678.
	PROCTER & GAMBLE CO	04/05/11	05/24/13	1,637.	1,237.			400.
2 Totals.	Add the amounts in columns (d), (e), (g) and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ►			44,041.	43,254.			787.

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Social security number or taxpayer identification no.

████████████████████

Part II Long-Term. Transactions involving capital assets you held more than one year are long term. For short-term transactions, see page 1.

☐ (F) Long-term transactions not reported to you on Form 1099-B

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

Qualified Dividends and Capital Gain Tax Worksheet - Line 44

Keep for Your Records

Name(s) shown on return MARIANNE D. WILLIAMSON		Your SSN [REDACTED]
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Before you begin: ✓ See the instructions for line 44 to see if you can use this worksheet to figure your tax.
 ✓ Before completing this worksheet, complete Form 1040 through line 43.
 ✓ If you do not have to file Schedule D and you received capital gain distributions, be sure you checked the box on line 13 of Form 1040.

<p>1. Enter the amount from Form 1040, line 43. However, if you are filing Form 2555 or 2555-EZ (relating to foreign earned income), enter the amount from line 3 of the Foreign Earned Income Tax Worksheet</p> <p>2. Enter the amount from Form 1040, line 9b*</p> <p>3. Are you filing Schedule D?*</p> <div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <input checked="" type="checkbox"/> Yes. Enter the smaller of line 15 or 16 of Schedule D. If either line 15 or line 16 is blank or a loss, enter -0- <input type="checkbox"/> No. Enter the amount from Form 1040, line 13 </div> <div style="font-size: 3em; margin: 0 10px;">}</div> <div> <p>3. <u>0.</u></p> </div> </div> <p>4. Add lines 2 and 3</p> <p>5. If filing Form 4952 (used to figure investment interest expense deduction), enter any amount from line 4g of that form. Otherwise, enter -0-</p> <p>6. Subtract line 5 from line 4. If zero or less, enter -0-</p> <p>7. Subtract line 6 from line 1. If zero or less, enter -0-</p> <p>8. Enter:</p> <div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <p>\$ 36,250 if single or married filing separately, \$ 72,500 if married filing jointly or qualifying widow(er), \$ 48,600 if head of household.</p> </div> <div style="font-size: 3em; margin: 0 10px;">}</div> <div> <p>8. <u>48,600.</u></p> </div> </div> <p>9. Enter the smaller of line 1 or line 8</p> <p>10. Enter the smaller of line 7 or line 9</p> <p>11. Subtract line 10 from line 9. This amount is taxed at 0%</p> <p>12. Enter the smaller of line 1 or line 6</p> <p>13. Enter the amount from line 11</p> <p>14. Subtract line 13 from line 12</p> <p>15. Enter:</p> <div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <p>\$ 400,000 if single, \$ 225,000 if married filing separately, \$ 450,000 if married filing jointly or qualifying widow(er), \$ 425,000 if head of household.</p> </div> <div style="font-size: 3em; margin: 0 10px;">}</div> <div> <p>15. <u>425,000.</u></p> </div> </div> <p>16. Enter the smaller of line 1 or line 15</p> <p>17. Add lines 7 and 11</p> <p>18. Subtract line 17 from line 16. If zero or less, enter -0-</p> <p>19. Enter the smaller of line 14 or line 18</p> <p>20. Multiply line 19 by 15% (.15)</p> <p>21. Add lines 11 and 19</p> <p>22. Subtract line 21 from line 12</p> <p>23. Multiply line 22 by 20% (.20)</p> <p>24. Figure the tax on the amount on line 7. If the amount on line 7 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 7 is \$100,000 or more, use the Tax Computation Worksheet</p> <p>25. Add lines 20, 23, and 24</p> <p>26. Figure the tax on the amount on line 1. If the amount on line 1 is less than \$100,000, use the Tax Table to figure the tax. If the amount on line 1 is \$100,000 or more, use the Tax Computation Worksheet</p> <p>27. Tax on all taxable income. Enter the smaller of line 25 or line 26. Also include this amount on Form 1040, line 44. If you are filing Form 2555 or 2555-EZ, do not enter this amount on Form 1040, line 44. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet</p>	<p>1. <u>597,933.</u></p> <p>2. <u>19,117.</u></p> <p>3. <u>0.</u></p> <p>4. <u>19,117.</u></p> <p>5. <u>0.</u></p> <p>6. <u>19,117.</u></p> <p>7. <u>578,816.</u></p> <p>8. <u>48,600.</u></p> <p>9. <u>48,600.</u></p> <p>10. <u>48,600.</u></p> <p>11. <u>0.</u></p> <p>12. <u>19,117.</u></p> <p>13. <u>0.</u></p> <p>14. <u>19,117.</u></p> <p>15. <u>425,000.</u></p> <p>16. <u>425,000.</u></p> <p>17. <u>578,816.</u></p> <p>18. <u>0.</u></p> <p>19. <u>0.</u></p> <p>20. <u>0.</u></p> <p>21. <u>0.</u></p> <p>22. <u>19,117.</u></p> <p>23. <u>3,823.</u></p> <p>24. <u>182,276.</u></p> <p>25. <u>186,099.</u></p> <p>26. <u>189,846.</u></p> <p>27. <u>186,099.</u></p>
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*If you are filing Form 2555 or 2555-EZ, see the footnote in the Foreign Earned Income Tax Worksheet before completing this line.

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

Your social security number

MARIANNE D. WILLIAMSON**Caution.** The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.**Part II Income or Loss From Partnerships and S Corporations** **Note.** If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 6198. See instructions.

27 Are you reporting any loss not allowed in a prior year due to the at-risk, excess farm loss, or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? ☐ Yes ☒ No

If you answered "Yes," see instructions before completing this section.

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	CEDAR FAIR LP	P			
B					
C					
D					

Passive Income and Loss**Nonpassive Income and Loss**(f) Passive loss allowed
(attach Form 8582 if required)(g) Passive income
from Schedule K-1(h) Nonpassive loss
from Schedule K-1(i) Section 179 expense
deduction from Form 4562(j) Nonpassive income
from Schedule K-1

PTPA	19.				
B					
C					
D					
29a	Totals				
b	Totals	19.			
30	Add columns (g) and (j) of line 29a			30	
31	Add columns (f), (h), and (i) of line 29b			31	(19.)
32	Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below			32	-19.

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		

Passive Income and Loss**Nonpassive Income and Loss**(c) Passive deduction or loss allowed
(attach Form 8582 if required)(d) Passive income
from Schedule K-1(e) Deduction or loss
from Schedule K-1(f) Other income from
Schedule K-1

A				
B				
34a	Totals			
b	Totals			
35	Add columns (d) and (f) of line 34a			35
36	Add columns (c) and (e) of line 34b			36
37	Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and include in the total on line 41 below			37

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b

39 Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below

39

Part V Summary

40	Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18	41	-19.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code V; and Schedule K-1 (Form 1041), box 14, code F (see instructions)	42	
43	Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Schedule E (Form 1040) 2013

SCHEDULE SE
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Self-Employment Tax

► Information about Schedule SE and its separate instructions is at www.irs.gov/schedulese.

► Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

2013

Attachment
Sequence No. **17**

Name of person with **self-employment** income (as shown on Form 1040)

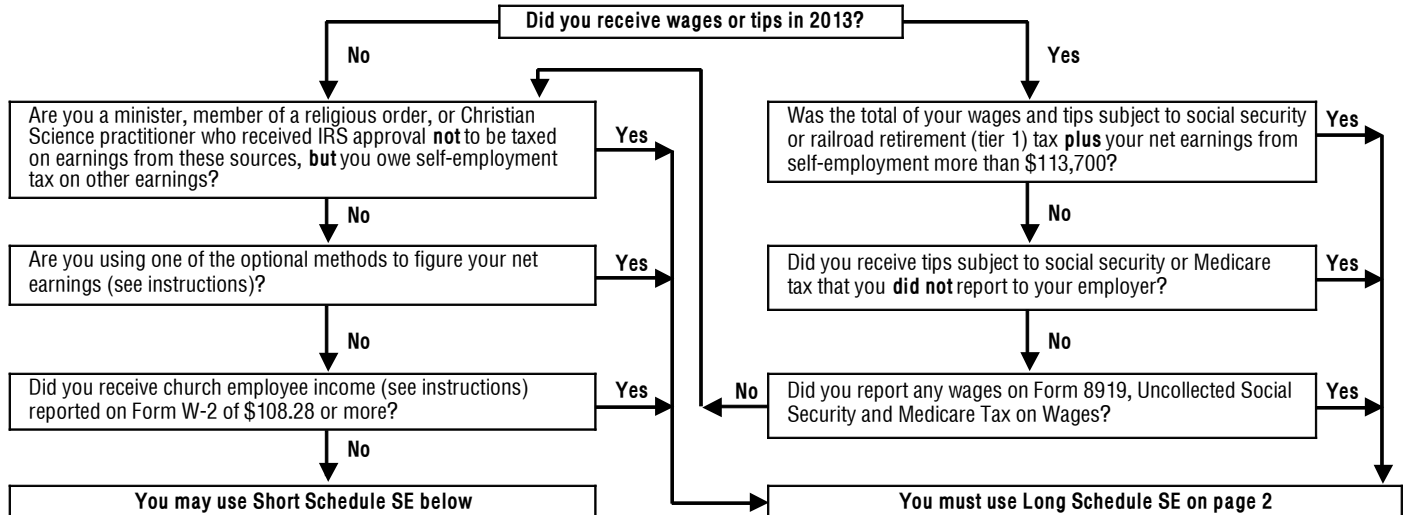
MARIANNE D. WILLIAMSON

Social security number of
person with **self-employment**
income

Before you begin: To determine if you must file Schedule SE, see the instructions.

May I Use Short Schedule SE or Must I Use Long Schedule SE?

Note. Use this flowchart **only** if you must file Schedule SE. If unsure, see *Who Must File Schedule SE* in the instructions.



Section A-Short Schedule SE. Caution. Read above to see if you can use Short Schedule SE.

1a Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A	1a	
b If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Z	1b	
2 Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report	2	700,545.
3 Combine lines 1a, 1b, and 2	3	700,545.
4 Multiply line 3 by 92.35% (.9235). If less than \$400, you do not owe self-employment tax; do not file this schedule unless you have an amount on line 1b	4	646,953.
5 Self-employment tax. If the amount on line 4 is: <ul style="list-style-type: none">• \$113,700 or less, multiply line 4 by 15.3% (.153). Enter the result here and on Form 1040, line 56, or Form 1040NR, line 54• More than \$113,700, multiply line 4 by 2.9% (.029). Then, add \$14,098.80 to the result. Enter the total here and on Form 1040, line 56, or Form 1040NR, line 54	5	32,860.
6 Deduction for one-half of self-employment tax. Multiply line 5 by 50% (.50). Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27	6	16,430.

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

Schedule SE (Form 1040) 2013

Foreign Tax Credit
(Individual, Estate, or Trust)

► Attach to Form 1040, 1040NR, 1041, or 990-T.

► Information about Form 1116 and its separate instructions is at www.irs.gov/form1116

OMB No. 1545-0121

2013

Attachment
Sequence No. **19**

Name

Identifying number as shown on page 1 of your tax return

MARIANNE D. WILLIAMSON

Use a separate Form 1116 for each category of income listed below. See **Categories of Income** in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a ☒ Passive category income c ☐ Section 901(j) income e ☐ Lump-sum distributions
b ☐ General category income d ☐ Certain income re-sourced by treaty

f Resident of (name of country) ► **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
9 Enter the name of the foreign country or U.S. possession ► OTHER COUNTRIES				
1a Gross income from sources within country shown above and of the type checked above:				
	882.			1a 882.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ► <input type="checkbox"/>				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related :				
a Certain itemized deductions or standard deduction	75,132.			
b Other deductions (attach statement)				
c Add lines 3a and 3b	75,132.			
d Gross foreign source income	1,747.			
e Gross income from all sources	1,193,700.			
f Divide line 3d by line 3e	.001464			
g Multiply line 3c by line 3f	110.			
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	110.			6 110.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 772.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued (j) Date paid or accrued	Foreign taxes paid or accrued							(s) Total foreign taxes paid or accrued (add cols. (o) through (r))	
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(n) Other foreign taxes paid or accrued	Taxes withheld at source on:				(r) Other foreign taxes paid or accrued
		(k) Dividends	(l) Rents and royalties	(m) Interest		(o) Dividends	(p) Rents and royalties	(q) Interest		
A	12/31/13					82.				82.
B										
C										
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2										8 82.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2013)

Part III Figuring the Credit

9 Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	82.	
10 Carryback or carryover (attach detailed computation)	10		
11 Add lines 9 and 10	11	82.	
12 Reduction in foreign taxes	12		
13 Taxes reclassified under high tax kickout	13		
14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		82.
15 Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	772.	
16 Adjustments to line 15	16		
17 Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	772.	
18 Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption SEE STATEMENT 18	18	588,472.	
Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19 Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.001312
20 Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37	20		186,099.
Caution: If you are completing line 20 for separate category <i>e</i> (lump-sum distributions), see instructions.			
21 Multiply line 20 by line 19 (maximum amount of credit)	21		244.
22 Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		82.

Part IV Summary of Credits From Separate Parts III

23 Credit for taxes on passive category income	23		
24 Credit for taxes on general category income	24		
25 Credit for taxes on certain income re-sourced by treaty	25		
26 Credit for taxes on lump-sum distributions	26		
27 Add lines 23 through 26	27		
28 Enter the smaller of line 20 or line 27	28		82.
29 Reduction of credit for international boycott operations	29		
30 Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30		82.

Form **1116** (2013)

Form **4797**Department of the Treasury
Internal Revenue Service

Name(s) shown on return

Sales of Business Property
(Also Involuntary Conversions and Recapture Amounts
Under Sections 179 and 280F(b)(2))

▶ Attach to your tax return.

▶ Information about Form 4797 and its separate instructions is at www.irs.gov/form4797.

OMB No. 1545-0184

2013Attachment
Sequence No. **27**

Identifying number

MARIANNE D. WILLIAMSON**1** Enter the gross proceeds from sales or exchanges reported to you for 2013 on Form(s) 1099-B or 1099-S
(or substitute statement) that you are including on line 2, 10, or 20**1****Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From
Other Than Casualty or Theft-Most Property Held More Than 1 Year** (see instructions)

(a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
2 CEDAR FAIR LP						19.

- 3** Gain, if any, from Form 4684, line 39 **3**
- 4** Section 1231 gain from installment sales from Form 6252, line 26 or 37 **4**
- 5** Section 1231 gain or (loss) from like-kind exchanges from Form 8824 **5**
- 6** Gain, if any, from line 32, from other than casualty or theft **6**
- 7** Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows: **7 19.**

Partnerships (except electing large partnerships) and S corporations. Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.**Individuals, partners, S corporation shareholders, and all others.** If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you did not have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.

- 8** Nonrecaptured net section 1231 losses from prior years (see instructions) **STATEMENT 19 8 149.**
- 9** Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return (see instructions) **9 0.**

Part II Ordinary Gains and Losses (see instructions)**10** Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

- 11** Loss, if any, from line 7 **11**
- 12** Gain, if any, from line 7 or amount from line 8, if applicable **12 19.**
- 13** Gain, if any, from line 31 **13**
- 14** Net gain or (loss) from Form 4684, lines 31 and 38a **14**
- 15** Ordinary gain from installment sales from Form 6252, line 25 or 36 **15**
- 16** Ordinary gain or (loss) from like-kind exchanges from Form 8824 **16**
- 17** Combine lines 10 through 16 **17 19.**
- 18** For all except individual returns, enter the amount from line 17 on the appropriate line of your return and skip lines a and b below. For individual returns, complete lines a and b below:
- a** If the loss on line 11 includes a loss from Form 4684, line 35, column (b)(ii), enter that part of the loss here. Enter the part of the loss from income-producing property on Schedule A (Form 1040), line 28, and the part of the loss from property used as an employee on Schedule A (Form 1040), line 23. Identify as from "Form 4797, line 18a." See instructions **18a**
- b** Redetermine the gain or (loss) on line 17 excluding the loss, if any, on line 18a. Enter here and on Form 1040, line 14 **18b 19.**

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4797** (2013)

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property:		(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)
A			
B			
C			
D			
These columns relate to the properties on lines 19A through 19D.		Property A	Property B
		Property C	Property D
20 Gross sales price (Note: See line 1 before completing.)	20		
21 Cost or other basis plus expense of sale	21		
22 Depreciation (or depletion) allowed or allowable	22		
23 Adjusted basis. Subtract line 22 from line 21	23		
24 Total gain. Subtract line 23 from line 20	24		
25 If section 1245 property:			
a Depreciation allowed or allowable from line 22	25a		
b Enter the smaller of line 24 or 25a	25b		
26 If section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291.			
a Additional depreciation after 1975 (see instructions)	26a		
b Applicable percentage multiplied by the smaller of line 24 or line 26a (see instructions)	26b		
c Subtract line 26a from line 24. If residential rental property or line 24 is not more than line 26a, skip lines 26d and 26e	26c		
d Additional depreciation after 1969 and before 1976	26d		
e Enter the smaller of line 26c or 26d	26e		
f Section 291 amount (corporations only)	26f		
g Add lines 26b, 26e, and 26f	26g		
27 If section 1252 property: Skip this section if you did not dispose of farmland or if this form is being completed for a partnership (other than an electing large partnership).			
a Soil, water, and land clearing expenses	27a		
b Line 27a multiplied by applicable percentage	27b		
c Enter the smaller of line 24 or 27b	27c		
28 If section 1254 property:			
a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion (see instructions)	28a		
b Enter the smaller of line 24 or 28a	28b		
29 If section 1255 property:			
a Applicable percentage of payments excluded from income under section 126 (see instructions)	29a		
b Enter the smaller of line 24 or 29a (see instructions)	29b		

Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

30 Total gains for all properties. Add property columns A through D, line 24	30	
31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13	31	
32 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6	32	

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

	(a) Section 179	(b) Section 280F(b)(2)
33 Section 179 expense deduction or depreciation allowable in prior years	33	
34 Recomputed depreciation (see instructions)	34	
35 Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35	

Alternative Minimum Tax - Individuals

► Information about Form 6251 and its separate instructions is at www.irs.gov/form6251.
► Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

2013
Attachment
Sequence No. **32**

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

MARIANNE D. WILLIAMSON

Part I Alternative Minimum Taxable Income

1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)	1	597,933.
2 Medical and dental. If you or your spouse was 65 or older, enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3 Taxes from Schedule A (Form 1040), line 9	3	85,641.
4 Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5 Miscellaneous deductions from Schedule A (Form 1040), line 27	5	
6 If Form 1040, line 38, is \$150,000 or less, enter -0-. Otherwise, see instructions	6	-12,333.
7 Tax refund from Form 1040, line 10 or line 21	7	
8 Investment interest expense (difference between regular tax and AMT)	8	
9 Depletion (difference between regular tax and AMT)	9	
10 Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11 Alternative tax net operating loss deduction	11	
12 Interest from specified private activity bonds exempt from the regular tax	12	
13 Qualified small business stock (7% of gain excluded under section 1202)	13	
14 Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15 Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16 Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17 Disposition of property (difference between AMT and regular tax gain or loss)	17	
18 Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19 Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 20	19	0.
20 Loss limitations (difference between AMT and regular tax income or loss)	20	
21 Circulation costs (difference between regular tax and AMT)	21	
22 Long-term contracts (difference between AMT and regular tax income)	22	
23 Mining costs (difference between regular tax and AMT)	23	
24 Research and experimental costs (difference between regular tax and AMT)	24	
25 Income from certain installment sales before January 1, 1987	25	
26 Intangible drilling costs preference	26	
27 Other adjustments, including income-based related adjustments	27	
28 Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$238,550, see instructions.)	28	671,241.

Part II Alternative Minimum Tax (AMT)

29 Exemption. (If you were under age 24 at the end of 2013, see instructions.)	29	0.
IF your filing status is... AND line 28 is not over... THEN enter on line 29... Single or head of household \$115,400 \$51,900 Married filing jointly or qualifying widow(er) ... 153,900 80,800 Married filing separately 76,950 40,400 If line 28 is over the amount shown above for your filing status, see instructions.		
30 Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34	30	671,241.
31 • If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 60 here. • All others: If line 30 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result.	31	182,828.
32 Alternative minimum tax foreign tax credit (see instructions)	32	82.
33 Tentative minimum tax. Subtract line 32 from line 31	33	182,746.
34 Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Sch J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Sch J	34	186,017.
35 AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35	0.

Part III Tax Computation Using Maximum Capital Gains Rates

Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax Worksheet in the instructions.

36 Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31	36	671,241.
37 Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	37	19,117.
38 Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	38	
39 If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	39	19,117.
40 Enter the smaller of line 36 or line 39	40	19,117.
41 Subtract line 40 from line 36	41	652,124.
42 If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	42	179,005.
43 Enter:	43	48,600.
<ul style="list-style-type: none"> • \$72,500 if married filing jointly or qualifying widow(er), • \$36,250 if single or married filing separately, or • \$48,600 if head of household. 		
44 Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040, line 43; but do not enter less than -0-	44	578,816.
45 Subtract line 44 from line 43. If zero or less, enter -0-	45	0.
46 Enter the smaller of line 36 or line 37	46	19,117.
47 Enter the smaller of line 45 or line 46. This amount is taxed at 0%	47	0.
48 Subtract line 47 from line 46	48	19,117.
49 Enter the amount from the Line 49 Worksheet in the instructions STMT 21	49	0.
50 Enter the smaller of line 48 or line 49	50	0.
51 Multiply line 50 by 15% (.15)	51	
52 Add lines 47 and 50	52	0.
If lines 52 and 36 are the same, skip lines 53 through 57 and go to line 58. Otherwise, go to line 53.		
53 Subtract line 52 from line 46	53	19,117.
54 Multiply line 53 by 20% (.20)	54	3,823.
If line 38 is zero or blank, skip lines 55 through 57 and go to line 58. Otherwise, go to line 55.		
55 Add lines 41, 52, and 53	55	
56 Subtract line 55 from line 36	56	
57 Multiply line 56 by 25% (.25)	57	
58 Add lines 42, 51, 54, and 57	58	182,828.
59 If line 36 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	59	184,357.
60 Enter the smaller of line 58 or line 59 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31	60	182,828.

Form 6251 (2013)

**ALTERNATIVE MINIMUM TAX
Foreign Tax Credit**
(Individual, Estate, or Trust)

OMB No. 1545-0121

2013

Attachment
Sequence No. **19**

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ Information about Form 1116 and its separate instructions is at www.irs.gov/form1116

Name **MARIANNE D. WILLIAMSON** Identifying number as shown on page 1 of your tax return XXXXXXXXXX

Use a separate Form 1116 for each category of income listed below. See **Categories of Income** in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a ☒ Passive category income c ☐ Section 901(j) income e ☐ Lump-sum distributions
b ☐ General category income d ☐ Certain income re-sourced by treaty

f Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
9 Enter the name of the foreign country or U.S. possession ▶ OTHER COUNTRIES				
1a Gross income from sources within country shown above and of the type checked above:				
	1,248.			1a 1,248.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement)				
3 Pro rata share of other deductions not definitely related :				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income	1,747.			
e Gross income from all sources	1,193,700.			
f Divide line 3d by line 3e	.001464			
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5				6
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 1,248.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued (j) Date paid or accrued	Foreign taxes paid or accrued							(s) Total foreign taxes paid or accrued (add cols. (o) through (r))	
		In foreign currency				In U.S. dollars				
		Taxes withheld at source on:			(n) Other foreign taxes paid or accrued	Taxes withheld at source on:				(r) Other foreign taxes paid or accrued
		(k) Dividends	(l) Rents and royalties	(m) Interest		(o) Dividends	(p) Rents and royalties	(q) Interest		
A	12/31/13					82.			82.	
B										
C										
8		Add lines A through C, column (s). Enter the total here and on line 9, page 2							8 82.	

LHA For Paperwork Reduction Act Notice, see instructions.

Form **1116** (2013)

ALTERNATIVE MINIMUM TAX

Form 1116 (2013) **MARIANNE D. WILLIAMSON**

Page **2**

Part III Figuring the Credit

9 Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	82.	
10 Carryback or carryover (attach detailed computation)	10		
11 Add lines 9 and 10	11	82.	
12 Reduction in foreign taxes	12		
13 Taxes reclassified under high tax kickout	13		
14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		82.
15 Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	1,248.	
16 Adjustments to line 15	16		
17 Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	1,248.	
18 Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption SEE STATEMENT 22	18	665,779.	
Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19 Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.001874
20 Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37	20		182,828.
Caution: If you are completing line 20 for separate category <i>e</i> (lump-sum distributions), see instructions.			
21 Multiply line 20 by line 19 (maximum amount of credit)	21		343.
22 Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		82.

Part IV Summary of Credits From Separate Parts III

23 Credit for taxes on passive category income	23		
24 Credit for taxes on general category income	24		
25 Credit for taxes on certain income re-sourced by treaty	25		
26 Credit for taxes on lump-sum distributions	26		
27 Add lines 23 through 26	27		
28 Enter the smaller of line 20 or line 27	28		82.
29 Reduction of credit for international boycott operations	29		
30 Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30		82.

Form **1116** (2013)

Additional Medicare Tax**2013**Attachment
Sequence No. **71**

▶ If any line does not apply to you, leave it blank. See separate instructions.

▶ Attach to Form 1040, 1040NR, 1040-PR, or 1040-SS.

▶ Information about Form 8959 and its instructions is at www.irs.gov/form8959

Name(s) shown on Form 1040

MARIANNE D. WILLIAMSON

Your social security number

Part I Additional Medicare Tax on Medicare Wages

1 Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1		
2 Unreported tips from Form 4137, line 6	2		
3 Wages from Form 8919, line 6	3		
4 Add lines 1 through 3	4		
5 Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying widow(er) \$200,000	5		
6 Subtract line 5 from line 4. If the result is zero or less, enter -0-	6		
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (.009). Enter here and go to Part II	7		

Part II Additional Medicare Tax on Self-Employment Income

8 Self-employment income from Schedule SE (Form 1040), Section A, line 4, or Section B, line 6. If you had a loss, enter -0- (Form 1040-PR and Form 1040-SS filers, see instructions.)	8	646,953.	
9 Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying widow(er) \$200,000	9	200,000.	
10 Enter the amount from line 4	10		
11 Subtract line 10 from line 9. If zero or less, enter -0-	11	200,000.	
12 Subtract line 11 from line 8. If the result is zero or less, enter -0-	12	446,953.	
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (.009). Enter here and go to Part III	13	4,023.	

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

14 Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions)	14		
15 Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying widow(er) \$200,000	15		
16 Subtract line 15 from line 14. If zero or less, enter -0-	16		
17 Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (.009). Enter here and go to Part IV	17		

Part IV Total Additional Medicare Tax

18 Add lines 7, 13, and 17. Also include this amount on Form 1040, line 60, (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions) and go to Part V	18	4,023.
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Part V Withholding Reconciliation

19 Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19		
20 Enter the amount from line 1	20		
21 Multiply line 20 by 1.45% (.0145). This is your regular Medicare tax withholding on Medicare wages	21		
22 Subtract line 21 from line 19. This is your Additional Medicare Tax withholding on Medicare wages	22		
23 Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
24 Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, line 62 (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions)	24		

**Net Investment Income Tax -
Individuals, Estates, and Trusts**▶ **Attach to Form 1040 or Form 1041.**

OMB No. 1545-2227

2013Attachment
Sequence No. **72**▶ **Information about Form 8960 and its separate instructions is at** www.irs.gov/form8960

Name(s) shown on Form 1040 or Form 1041

MARIANNE D. WILLIAMSON

Your social security number or EIN

Part I Investment Income

- ☐ Section 6013(g) election (see instructions)
- ☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (Form 1040, line 8a; or Form 1041, line 1)	1	2,330.
2	Ordinary dividends (Form 1040, line 9a; or Form 1041, line 2a)	2	24,570.
3	Annuities from nonqualified plans (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (Form 1040, line 17; or Form 1041, line 5)	4a	-19.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b	
c	Combine lines 4a and 4b	4c	-19.
5a	Net gain or loss from disposition of property from Form 1040, combine lines 13 and 14; or from Form 1041, combine lines 4 and 7	5a	-2,981.
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b	
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c	
d	Combine lines 5a through 5c	5d	-2,981.
6	Changes to investment income for certain CFCs and PFICs (see instructions)	6	
7	Other modifications to investment income (see instructions)	7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7	8	23,900.

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions)	9a	
b	State income tax (see instructions)	9b	2,317.
c	Miscellaneous investment expenses (see instructions)	9c	
d	Add lines 9a, 9b, and 9c	9d	2,317.
10	Additional modifications (see instructions)	10	
11	Total deductions and modifications. Add lines 9d and 10	11	2,317.

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11 from Part I, line 8. Individuals complete lines 13-17. Estates and trusts complete lines 18a-21. If zero or less, enter -0-	12	21,583.
Individuals:			
13	Modified adjusted gross income (see instructions)	13	686,104.
14	Threshold based on filing status (see instructions)	14	200,000.
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	486,104.
16	Enter the smaller of line 12 or line 15	16	21,583.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and on Form 1040, line 60	17	820.
Estates and Trusts:			
18a	Net investment income (line 12 above)	18a	
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b	
c	Undistributed net investment income. Subtract line 18b from 18a (see instructions)	18c	
19a	Adjusted gross income (see instructions)	19a	
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b	
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c	
20	Enter the smaller of line 18c or line 19c	20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (.038). Enter here and on Form 1041, Schedule G, line 4	21	

LHA **For Paperwork Reduction Act Notice, see your tax return instructions.**Form **8960** (2013)

**Credit for Prior Year Minimum Tax -
Individuals, Estates, and Trusts**

► **Information about Form 8801 and its separate instructions is at** www.irs.gov/form8801.
 ► **Attach to Form 1040, 1040NR, or 1041.**

2013Attachment
Sequence No. **74**

Name(s) shown on return

Identifying number

MARIANNE D. WILLIAMSON**Part I Net Minimum Tax on Exclusion Items**

1 Combine lines 1 and 10 of your 2012 Form 6251. Estates and trusts, see instructions	1	689,439.
2 Enter adjustments and preferences treated as exclusion items (see instructions)	2	109,435.
3 Minimum tax credit net operating loss deduction (see instructions)	3	()
4 Combine lines 1, 2, and 3. If zero or less, enter -0- here and on line 15 and go to Part II. If more than \$232,500 and you were married filing separately for 2012, see instructions	4	798,874.
5 Enter: \$78,750 if married filing jointly or qualifying widow(er) for 2012; \$50,600 if single or head of household for 2012; or \$39,375 if married filing separately for 2012. Estates and trusts, enter \$22,500	5	50,600.
6 Enter: \$150,000 if married filing jointly or qualifying widow(er) for 2012; \$112,500 if single or head of household for 2012; or \$75,000 if married filing separately for 2012. Estates and trusts, enter \$75,000	6	112,500.
7 Subtract line 6 from line 4. If zero or less, enter -0- here and on line 8 and go to line 9	7	686,374.
8 Multiply line 7 by 25% (.25)	8	171,594.
9 Subtract line 8 from line 5. If zero or less, enter -0-. If under age 24 at the end of 2012, see instructions	9	0.
10 Subtract line 9 from line 4. If zero or less, enter -0- here and on line 15 and go to Part II. Form 1040NR filers, see instructions	10	798,874.
11 • If for 2012 you filed Form 2555 or 2555-EZ, see instructions for the amount to enter. • If for 2012 you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b (Form 1041, line 2b(2)); or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (lines 14a and 15, column (2), of Schedule D (Form 1041)), complete Part III of Form 8801 and enter the amount from line 45 here. Form 1040NR filers, see instructions. • All others: If line 10 is \$175,000 or less (\$87,500 or less if married filing separately for 2012), multiply line 10 by 26% (.26). Otherwise, multiply line 10 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2012) from the result. Form 1040NR filers, see instructions.	11	218,006.
12 Minimum tax foreign tax credit on exclusion items (see instructions)	12	228.
13 Tentative minimum tax on exclusion items. Subtract line 12 from line 11	13	217,778.
14 Enter the amount from your 2012 Form 6251, line 34, or 2012 Form 1041, Schedule I, line 55	14	208,370.
15 Net minimum tax on exclusion items. Subtract line 14 from line 13. If zero or less, enter -0-	15	9,408.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8801** (2013)

Part II Minimum Tax Credit and Carryforward to 2014

16 Enter the amount from your 2012 Form 6251, line 35, or 2012 Form 1041, Schedule I, line 56	16	10,398.
17 Enter the amount from line 15	17	9,408.
18 Subtract line 17 from line 16. If less than zero, enter as a negative amount	18	990.
19 2012 credit carryforward. Enter the amount from your 2012 Form 8801, line 28	19	42.
20 Enter your 2012 unallowed qualified electric vehicle credit (see instructions)	20	
21 Combine lines 18 through 20. If zero or less, stop here and see the instructions	21	1,032.
22 Enter your 2013 regular income tax liability minus allowable credits (see instructions)	22	186,017.
23 Enter the amount from your 2013 Form 6251, line 33, or 2013 Form 1041, Schedule I, line 54	23	182,746.
24 Subtract line 23 from line 22. If zero or less, enter -0-	24	3,271.
25 Minimum tax credit. Enter the smaller of line 21 or line 24. Also enter this amount on your 2013 Form 1040, line 53 (check box b); Form 1040NR, line 50 (check box b); or Form 1041, Schedule G, line 2c	25	1,032.
26 Credit carryforward to 2014. Subtract line 25 from line 21. Keep a record of this amount because you may use it in future years	26	0.

Form 8801 (2013)

Part III Tax Computation Using Maximum Capital Gains Rates

Caution. If you did not complete the 2012 Qualified Dividends and Capital Gain Tax Worksheet, the 2012 Schedule D Tax Worksheet, or Part V of the 2012 Schedule D (Form 1041), see the instructions before completing this part.

27 Enter the amount from Form 8801, line 10. If you filed Form 2555 or 2555-EZ for 2012, enter the amount from line 3 of the Foreign Earned Income Tax Worksheet in the instructions **27** **798,874.**

Caution. If for **2012** you filed Form 1040NR, 1041, 2555, or 2555-EZ, see the instructions before completing lines 28, 29, and 30.

28 Enter the amount from line 6 of your 2012 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 13 of your 2012 Schedule D Tax Worksheet, or the amount from line 22 of the 2012 Schedule D (Form 1041), whichever applies* **28** **16,761.**

If you figured your 2012 tax using the 2012 Qualified Dividends and Capital Gain Tax Worksheet, skip line 29 and enter the amount from line 28 on line 30. Otherwise, go to line 29.

29 Enter the amount from line 19 of your 2012 Schedule D (Form 1040), or line 14b, column (2), of the 2012 Schedule D (Form 1041) **29**

30 Add lines 28 and 29, and enter the **smaller** of that result or the amount from line 10 of your 2012 Schedule D Tax Worksheet **30** **16,761.**

31 Enter the **smaller** of line 27 or line 30 **31** **16,761.**

32 Subtract line 31 from line 27 **32** **782,113.**

33 If line 32 is \$175,000 or less (\$87,500 or less if married filing separately for 2012), multiply line 32 by 26% (.26). Otherwise, multiply line 32 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2012) from the result. Form 1040NR filers, see instructions **33** **215,492.**

34 Enter:
 • \$70,700 if married filing jointly or qualifying widow(er) for 2012,
 • \$35,350 if single or married filing separately for 2012,
 • \$47,350 if head of household for 2012, or
 • \$2,400 for an estate or trust.
 Form 1040NR filers, see instructions **34** **47,350.**

35 Enter the amount from line 7 of your 2012 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 14 of your 2012 Schedule D Tax Worksheet, or the amount from line 23 of the 2012 Schedule D (Form 1041), whichever applies. If you did not complete either worksheet or Part V of the 2012 Schedule D (Form 1041), enter -0-. Form 1040NR filers, see instructions **35** **665,078.**

36 Subtract line 35 from line 34. If zero or less, enter -0- **36** **0.**

37 Enter the **smaller** of line 27 or line 28 **37** **16,761.**

38 Enter the **smaller** of line 36 or line 37 **38**

39 Subtract line 38 from line 37 **39** **16,761.**

40 Multiply line 39 by 15% (.15) **40** **2,514.**

If line 29 is zero or blank, skip lines 41 and 42 and go to line 43. Otherwise, go to line 41.

41 Subtract line 37 from line 31 **41**

42 Multiply line 41 by 25% (.25) **42**

43 Add lines 33, 40, and 42 **43** **218,006.**

44 If line 27 is \$175,000 or less (\$87,500 or less if married filing separately for 2012), multiply line 27 by 26% (.26). Otherwise, multiply line 27 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2012) from the result. Form 1040NR filers, see instructions **44** **220,185.**

45 Enter the **smaller** of line 43 or line 44 here and on line 11. If you filed Form 2555 or 2555-EZ for 2012, do not enter this amount on line 11. Instead, enter it on line 4 of the Foreign Earned Income Tax Worksheet in the instructions **45** **218,006.**

* The 2012 Qualified Dividends and Capital Gain Tax Worksheet is in the 2012 Instructions for Form 1040. The 2012 Schedule D Tax Worksheet is in the 2012 Instructions for Schedule D (Form 1040) (or the 2012 Instructions for Schedule D (Form 1041)).

Name

MARIANNE D. WILLIAMSON

Identifying number as shown on page 1 of your tax return

Use a separate Form 1116 for each category of income listed below. See **Categories of Income** in the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- a

☒

Passive category income
- c

☐

Section 901(j) income
- e

☐

Lump-sum distributions
- b

☐

General category income
- d

☐

Certain income re-sourced by treaty

f Resident of (name of country) ▶ UNITED STATES

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession ▶	CANADA	MEXICO	OTHER COUNTRIES	
1a Gross income from sources within country shown above and of the type checked above:				
	1,223.	14.	686.	1,923.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement)	828.	12.		
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income	1,223.	14.	1,281.	
e Gross income from all sources	1,370,283.	1,370,283.	1,370,283.	
f Divide line 3d by line 3e	.000893	.000010	.000935	
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use worksheet for Home Mortgage Interest in the instructions)				
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	828.	12.		840.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2 ▶				1,083.

Part II Foreign Taxes Paid or Accrued

Country	Foreign taxes paid or accrued							
	In foreign currency				In U.S. dollars			
	Taxes withheld at source on:			(n) Other foreign taxes paid or accrued	Taxes withheld at source on:			(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
	(h) <input type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(o) Dividends	(p) Rents and royalties	(q) Interest
A								
B								
C								

8 Add lines A through C, column (s). Enter the total here and on line 9, page 2 ▶ 8

Part III Figuring the Credit

9 Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	228.	
10 Carryback or carryover (attach detailed computation)	10		
11 Add lines 9 and 10	11	228.	
12 Reduction in foreign taxes	12		
13 Taxes reclassified under high tax kickout	13		
14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		228.
15 Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	1,083.	
16 Adjustments to line 15	16		
17 Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	1,083.	
18 Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption	18	791,092.	
Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.			
19 Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.001369
20 Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37	20		218,006.
Caution: If you are completing line 20 for separate category <i>e</i> (lump-sum distributions), see instructions.			
21 Multiply line 20 by line 19 (maximum amount of credit)	21		298.
22 Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		228.

Part IV Summary of Credits From Separate Parts III

23 Credit for taxes on passive category income	23		
24 Credit for taxes on general category income	24		
25 Credit for taxes on certain income re-sourced by treaty	25		
26 Credit for taxes on lump-sum distributions	26		
27 Add lines 23 through 26	27		
28 Enter the smaller of line 20 or line 27	28		228.
29 Reduction of credit for international boycott operations	29		
30 Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30		228.

Form **1116** (2012)

Name
MARIANNE D. WILLIAMSON

1. Enter your taxable income from Form 8801, line 10	1. <u>798,874.</u>
2. Enter your qualified dividends from Form 1040, line 9b	2. <u>N/A</u>
3. Enter the amount from Form 4952, line 4g	3. <u>N/A</u>
4. Enter the amount from Form 4952, line 4e*	4. <u>N/A</u>
5. Subtract line 4 from line 3. If zero or less, enter -0-	5. <u>N/A</u>
6. Subtract line 5 from line 2. If zero or less, enter -0-	6. <u>N/A</u>
7. Enter the smaller of line 15 or line 16 of Sch. D	7. <u>N/A</u>
8. Enter the smaller of line 3 or line 4	8. <u>N/A</u>
9. Subtract line 8 from line 7. If zero or less, enter -0-	9. <u>N/A</u>
10. Add lines 6 and 9	10. <u>16,761.</u>
11. Add lines 18 and 19 of Schedule D	11. <u></u>
12. Enter the smaller of line 9 or line 11	12. <u></u>
13. Subtract line 12 from line 10	13. <u>16,761.</u>
14. Subtract line 13 from line 1. If zero or less, enter -0-	14. <u>782,113.</u>
15. Enter:	
• \$35,350 if single or married filing separately; \$70,700 if married filing jointly or qualifying widow(er); or \$47,350 if head of household	15. <u>47,350.</u>
16. Enter the smaller of line 1 or line 15	16. <u>47,350.</u>
17. Enter the smaller of line 14 or line 16	17. <u>47,350.</u>
18. Subtract line 10 from line 1. If zero or less, enter -0-	18. <u>782,113.</u>
19. Enter the larger of line 17 or line 18	19. <u>782,113.</u>
20. Subtract line 17 from line 16. This amount is taxed at 0%	20. <u></u>
If lines 1 and 16 are the same, skip lines 21 through 33 and go to line 34. Otherwise, go to line 21.	
21. Enter the smaller of line 1 or line 13	21. <u>16,761.</u>
22. Enter the amount from line 20 (if line 20 is blank, enter -0-)	22. <u>0.</u>
23. Subtract line 22 from line 21. If zero or less, enter -0-	23. <u>16,761.</u>
24. Multiply line 23 by 15% (.15)	24. <u>N/A</u>
If Schedule D, line 19, is zero or blank, skip lines 25 through 30 and go to line 31. Otherwise, go to line 25.	
25. Enter the smaller of line 9 above or Schedule D, line 19	25. <u></u>
26. Add lines 10 and 19	26. <u></u>
27. Enter the amount from line 1 above	27. <u></u>
28. Subtract line 27 from line 26. If zero or less, enter -0-	28. <u></u>
29. Subtract line 28 from line 25. If zero or less, enter -0-	29. <u></u>
30. Multiply line 29 by 25% (.25)	30. <u>N/A</u>
If Schedule D, line 18, is zero or blank, skip lines 31 through 33 and go to line 34. Otherwise, go to line 31.	
31. Add lines 19, 20, 23, and 29	31. <u></u>
32. Subtract line 31 from line 1	32. <u></u>
33. Multiply line 32 by 28% (.28)	33. <u>N/A</u>
34. Figure the tax on the amount on line 19. Use the Tax Table or Tax Computation Worksheet, whichever applies	34. <u>N/A</u>
35. Add lines 24, 30, 33, and 34	35. <u>N/A</u>
36. Figure the tax on the amount on line 1. Use the Tax Table or Tax Computation Worksheet, whichever applies	36. <u>N/A</u>
37. Tax on all taxable income (including capital gains and qualified dividends). Enter the smaller of line 35 or line 36. Also include this amount on Form 1040, line 44	37. <u>N/A</u>

Form
1116AMT - 8801

Minimum Tax Foreign Tax Credit
on Exclusion Items
Worksheet for Line 18

Name

MARIANNE D. WILLIAMSON

1	Enter the amount from Form 8801, line 4		798,874.
2	Enter 2012 worldwide 28% gains	N/A	
3	Multiply line 2 by 0.2000	N/A	
4	Enter 2012 worldwide 25% gains		
5	Multiply line 4 by 0.1071		
6	Enter 2012 worldwide 15% gains and qualified dividends	16,761.	
7	Multiply line 6 by 0.4643	7,782.	
8	Enter 2012 worldwide 0% gains and qualified dividends		
9	Add lines 5, 7, and 8		7,782.
10	Subtract line 9 from line 1. Enter the result here and on MTFTCE Form 1116, line 18		791,092.

Name
MARIANNE D. WILLIAMSON

PASSIVE INCOME

	Short-term	Long-term			
		0%	15%	25%	28%
1 Separate category rate group capital gain or (loss)			1,281.		
2 U.S. capital loss adjustment					
3 Subtotal			1,281.		
4 Rate differential factor		0.0000	0.5357	0.8929	1.00
5 Adjusted capital gains and losses			686.		

Expenses for Business Use of Your Home► **File only with Schedule C (Form 1040). Use a separate Form 8829 for each home you used for business during the year.**

OMB No. 1545-0074

2013Attachment
Sequence No. **176**► **Information about Form 8829 and its separate instructions is at www.irs.gov/form8829.**

Name(s) of proprietor(s)

MARIANNE D. WILLIAMSON

Your social security number

Part I Part of Your Home Used for Business

1	Area used regularly and exclusively for business, regularly for daycare, or for storage of inventory or product samples	1	288
2	Total area of home	2	2,246
3	Divide line 1 by line 2. Enter the result as a percentage	3	12.8228%
For daycare facilities not used exclusively for business, go to line 4. All others go to line 7.			
4	Multiply days used for daycare during year by hours used per day	4	hr.
5	Total hours available for use during the year (365 days x 24 hours)	5	hr.
6	Divide line 4 by line 5. Enter the result as a decimal amount	6	
7	Business percentage. For daycare facilities not used exclusively for business, multiply line 6 by line 3 (enter the result as a percentage). All others, enter the amount from line 3	7	12.8228%

Part II Figure Your Allowable Deduction

8	Enter the amount from Schedule C, line 29, plus any gain derived from the business use of your home and shown on Schedule D or Form 4797, minus any loss from the trade or business not derived from the business use of your home and shown on Schedule D or Form 4797. See instructions See instructions for columns (a) and (b) before completing lines 9-21.	8	712,017.
		(a) Direct expenses	(b) Indirect expenses
9	Casualty losses	9	
10	Deductible mortgage interest	10	
11	Real estate taxes	11	
12	Add lines 9, 10, and 11	12	
13	Multiply line 12, column (b) by line 7	13	
14	Add line 12, column (a) and line 13	14	
15	Subtract line 14 from line 8. If zero or less, enter -0-	15	712,017.
16	Excess mortgage interest	16	
17	Insurance	17	2,046.
18	Rent	18	75,000.
19	Repairs and maintenance	19	9,716.
20	Utilities	20	2,702.
21	Other expenses	21	
22	Add lines 16 through 21	22	89,464.
23	Multiply line 22, column (b) by line 7	23	11,472.
24	Carryover of operating expenses from 2012 Form 8829, line 42	24	
25	Add line 22, column (a), line 23, and line 24	25	11,472.
26	Allowable operating expenses. Enter the smaller of line 15 or line 25	26	11,472.
27	Limit on excess casualty losses and depreciation. Subtract line 26 from line 15	27	700,545.
28	Excess casualty losses	28	
29	Depreciation of your home from line 41 below	29	
30	Carryover of excess casualty losses and depreciation from 2012 Form 8829, line 43	30	
31	Add lines 28 through 30	31	
32	Allowable excess casualty losses and depreciation. Enter the smaller of line 27 or line 31	32	0.
33	Add lines 14, 26, and 32	33	11,472.
34	Casualty loss portion, if any, from lines 14 and 32. Carry amount to Form 4684 (see instructions)	34	0.
35	Allowable expenses for business use of your home. Subtract line 34 from line 33. Enter here and on Schedule C, line 30. If your home was used for more than one business, see instructions	35	11,472.

Part III Depreciation of Your Home

36	Enter the smaller of your home's adjusted basis or its fair market value	36	
37	Value of land included on line 36	37	
38	Basis of building. Subtract line 37 from line 36	38	
39	Business basis of building. Multiply line 38 by line 7	39	
40	Depreciation percentage	40	%
41	Depreciation allowable. Multiply line 39 by line 40. Enter here and on line 29 above	41	

Part IV Carryover of Unallowed Expenses to 2014

42	Operating expenses. Subtract line 26 from line 25. If less than zero, enter -0-	42	
43	Excess casualty losses and depreciation. Subtract line 32 from line 31. If less than zero, enter -0-	43	

Depreciation and Amortization
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

MARIANNE D. WILLIAMSON

MARIANNE WILLIAMSON

Identifying number

Part I Election To Expense Certain Property Under Section 179 *Note: If you have any listed property, complete Part V before you complete Part I.*

1	Maximum amount (see instructions)	1	
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2014. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II** Special Depreciation Allowance and Other Depreciation (Do not include listed property.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs.	MM	S/L	
i Nonresidential real property	/		39 yrs.	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year	/		40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	1,420.
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.	22	1,420.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V**Listed Property** (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.**Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)****24a** Do you have evidence to support the business/investment use claimed? ☒ **Yes** ☐ **No** **24b** If "Yes," is the evidence written? ☒ **Yes** ☐ **No**

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
--	-------------------------------------	--	-------------------------------	--	---------------------------	------------------------------	----------------------------------	---------------------------------------

25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use: **25****26** Property used more than 50% in a qualified business use:

TOYOTA PRIUS	122908	80.00 %	28,520.	14,048.5.00	200DB-HY	1,420.		
	122908	80.00 %						
	:	%						

27 Property used 50% or less in a qualified business use:

	:	%			S/L -			
	:	%			S/L -			
	:	%			S/L -			

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 **28** 1,420.**29** Add amounts in column (i), line 26. Enter here and on line 7, page 1 **29****Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle	(b) Vehicle 1	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year. Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?			X			
36 Is another vehicle available for personal use?			X			

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
-----------------------------	------------------------------------	------------------------------	------------------------	---	--------------------------------------

42 Amortization of costs that begins during your 2013 tax year:

	:				
	:				

43 Amortization of costs that began before your 2013 tax year **43****44 Total.** Add amounts in column (f). See the instructions for where to report **44**

Form 1116

U.S. and Foreign Source Income Summary

NAME

MARIANNE D. WILLIAMSON

INCOME TYPE	TOTAL	U.S.	FOREIGN PASSIVE
Compensation			
Dividends/Distributions SEE STATEMENT 24	24,570.	22,823.	1,747.
Interest	2,330.	2,330.	
Capital Gains	22,681.	22,681.	
Business/Profession	1,144,100.	1,144,100.	
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income	19.	19.	
Gross Income	<u>1,193,700.</u>	<u>1,191,953.</u>	<u>1,747.</u>
Less:			
Section 911 Exclusion			
Capital Losses	25,681.	25,681.	
Capital Gains Tax Adjustment			865.
Total Income - Form 1116	<u>1,168,019.</u>	<u>1,166,272.</u>	<u>882.</u>
Deductions:			
Business/Profession Expenses	443,555.	443,555.	
Rent/Royalty Expenses			
Partnership/S Corporation Losses	19.	19.	
Trust/Estate Losses			
Capital Losses			
Non-capital Losses			
Individual Retirement Account			
Moving Expenses			
Self-employment Tax Deduction	16,430.	16,430.	
Self-employment Health Insurance	21,911.	21,911.	
Keogh Contributions			
Alimony			
Forfeited Interest			
Foreign Housing Deduction			
Other Adjustments			
Capital Gains Tax Adjustment			
Total Deductions	<u>481,915.</u>	<u>481,915.</u>	
Adjusted Gross Income	<u>686,104.</u>	<u>684,357.</u>	<u>882.</u>
Less Itemized Deductions:			
Specifically Allocated	13,039.	13,039.	
Home Mortgage Interest			
Other Interest			
Ratably Allocated	75,132.	75,022.	110.
Total Adjustments to Adjusted Gross Income	<u>88,171.</u>	<u>88,061.</u>	<u>110.</u>
Taxable Income Before Exemptions	<u>597,933.</u>	<u>596,296.</u>	<u>772.</u>

Form 1116

Allocation of Itemized Deductions

NAME

MARIANNE D. WILLIAMSON

	Total Itemized Deductions	Itemized Deductions After Sec. 68 Reduction	Form 1116		
			Specifically U.S.	Specifically Foreign	Ratable
Taxes	85,641.	75,132.			75,132.
Interest - Not Including Investment Interest					
Contributions	14,863.	13,039.	13,039.		
Miscellaneous Deductions Subject to 2%					
Other Miscellaneous Deductions - Not Including Gambling Losses					
Foreign Adjustment					
Total Itemized Deductions Subject to Sec. 68	100,504.	88,171.			
Add Itemized Deductions Not Subject to Sec. 68:					
Medical/Dental					
Investment Interest					
Casualty Losses					
Gambling Losses					
Foreign Adjustment					
Total Itemized Deductions	100,504.				
Total Allowed on Schedule A		88,171.	13,039.		75,132.

NAME

MARIANNE D. WILLIAMSON

Foreign Income Category

PASSIVE INCOME

Regular	2008	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued						82.
2. FTC carryback to 2013 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						82.
5. Maximum credit allowable						244.
6. Unused foreign tax (+) or excess of limit (-)					-1.	-162.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					-1.	-162.
Total foreign taxes from all available years to be carried to next year						

	2003	2004	2005	2006	2007
1. Foreign tax paid/accrued					
2. FTC carryback to 2013 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax (+) or excess of limit (-)					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					

NAME

MARIANNE D. WILLIAMSON

Foreign Income Category

PASSIVE INCOME

AMT	2008	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued						82.
2. FTC carryback to 2013 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						82.
5. Maximum credit allowable						343.
6. Unused foreign tax (+) or excess of limit (-)					-70.	-261.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					-70.	-261.
Total foreign taxes from all available years to be carried to next year						

	2003	2004	2005	2006	2007
1. Foreign tax paid/accrued					
2. FTC carryback to 2013 for amended returns					
3. Reduction in foreign taxes					
4. Foreign tax available					
5. Maximum credit allowable					
6. Unused foreign tax (+) or excess of limit (-)					
7. Foreign tax carryback					
8. Foreign tax carryforward					
9. Foreign tax or excess limit remaining					



FORM 1040	STATE AND LOCAL INCOME TAX REFUNDS	STATEMENT	1
	2012	2011	2010
	CALIFORNIA		
GROSS STATE/LOCAL INC TAX REFUNDS	29,809.		
LESS: TAX PAID IN FOLLOWING YEAR	6,844.		
NET TAX REFUNDS CALIFORNIA	22,965.		
	GEORGIA		
GROSS STATE/LOCAL INC TAX REFUNDS	204.		
LESS: TAX PAID IN FOLLOWING YEAR	204.		
NET TAX REFUNDS GEORGIA	0.		
	ILLINOIS		
GROSS STATE/LOCAL INC TAX REFUNDS	214.		
LESS: TAX PAID IN FOLLOWING YEAR	214.		
NET TAX REFUNDS ILLINOIS	0.		
	MISSOURI		
GROSS STATE/LOCAL INC TAX REFUNDS	35.		
LESS: TAX PAID IN FOLLOWING YEAR	35.		
NET TAX REFUNDS MISSOURI	0.		
	NEW MEXICO		
GROSS STATE/LOCAL INC TAX REFUNDS	7.		
LESS: TAX PAID IN FOLLOWING YEAR	7.		
NET TAX REFUNDS NEW MEXICO	0.		
	NEW YORK		
GROSS STATE/LOCAL INC TAX REFUNDS	363.		
LESS: TAX PAID IN FOLLOWING YEAR	363.		
NET TAX REFUNDS NEW YORK	0.		



OKLAHOMA

GROSS STATE/LOCAL INC TAX REFUNDS
 LESS: TAX PAID IN FOLLOWING YEAR

93.
 93.

NET TAX REFUNDS OKLAHOMA

0.

TOTAL NET TAX REFUNDS

22,965.

1. IS THE AMOUNT ON FORM 1040, LINE 38, MORE THAN THE AMOUNT SHOWN ON LINE 4 BELOW FOR YOUR FILING STATUS?
 NO. STOP. MULTIPLY \$3,900 BY THE TOTAL NUMBER OF EXEMPTIONS CLAIMED ON FORM 1040, LINE 6D, AND ENTER THE RESULT ON LINE 42.
 YES. CONTINUE
2. MULTIPLY \$3,900 BY THE TOTAL NUMBER OF EXEMPTIONS CLAIMED ON FORM 1040, LINE 6D 7,800.
3. ENTER THE AMOUNT FROM FORM 1040, LINE 38 686,104.
4. ENTER THE AMOUNT FOR YOUR FILING STATUS 275,000.
 SINGLE \$250,000
 MARRIED FILING JOINTLY OR WIDOW(ER) \$300,000
 MARRIED FILING SEPARATELY \$150,000
 HEAD OF HOUSEHOLD \$275,000
5. SUBTRACT LINE 4 FROM LINE 3. IF THE RESULT IS MORE THAN \$122,500 (\$61,250 IF MARRIED FILING SEPARATELY), STOP. ENTER -0- ON LINE 42. 411,104.
6. DIVIDE LINE 5 BY \$2,500 (\$1,250 IF MARRIED FILING SEPARATELY). IF THE RESULT IS NOT A WHOLE NUMBER, INCREASE IT TO THE NEXT HIGHER WHOLE NUMBER (FOR EXAMPLE, INCREASE 0.0004 TO 1).
7. MULTIPLY LINE 6 BY 2% (.02) AND ENTER THE RESULT AS A DECIMAL
8. MULTIPLY LINE 2 BY LINE 7
9. SUBTRACT LINE 8 FROM LINE 2. TOTAL TO FORM 1040, LINE 42.



FORM 1040		TAXABLE STATE AND LOCAL INCOME TAX REFUNDS		STATEMENT	3
		2012	2011	2010	
NET TAX REFUNDS FROM STATE AND LOCAL INCOME TAX REFUNDS STMT.		22,965.			
LESS:REFUNDS-NO BENEFIT DUE TO AMT -SALES TAX BENEFIT REDUCTION		22,965.			
1	NET REFUNDS FOR RECALCULATION				
2	TOTAL ITEMIZED DEDUCTIONS BEFORE PHASEOUT	122,931.			
3	DEDUCTION NOT SUBJ TO PHASEOUT				
4	NET REFUNDS FROM LINE 1				
5	LINE 2 MINUS LINES 3 AND 4	122,931.			
6	MULT LN 5 BY APPL SEC. 68 PCT				
7	PRIOR YEAR AGI				
8	ITEM. DED. PHASEOUT THRESHOLD				
9	SUBTRACT LINE 8 FROM LINE 7 (IF ZERO OR LESS, SKIP LINES 10 THROUGH 15, AND ENTER AMOUNT FROM LINE 1 ON LINE 16)				
10	MULT LN 9 BY APPL SEC. 68 PCT				
11	ALLOWABLE ITEMIZED DEDUCTIONS (LINE 5 LESS THE LESSER OF LINE 6 OR LINE 10)				
12	ITEM DED. NOT SUBJ TO PHASEOUT				
13A	TOTAL ADJ. ITEMIZED DEDUCTIONS	122,931.			
13B	PRIOR YR. STD. DED. AVAILABLE	8,700.			
14	PRIOR YR. ALLOWABLE ITEM. DED.	122,931.			
15	SUBTRACT THE GREATER OF LINE 13A OR LINE 13B FROM LINE 14				
16	TAXABLE REFUNDS (LESSER OF LINE 15 OR LINE 1)				
17	ALLOWABLE PRIOR YR. ITEM. DED.	122,931.			
18	PRIOR YEAR STD. DED. AVAILABLE	8,700.			
19	SUBTRACT LINE 18 FROM LINE 17	114,231.			
20	LESSER OF LINE 16 OR LINE 19				
21	PRIOR YEAR TAXABLE INCOME	681,839.			
22	AMOUNT TO INCLUDE ON FORM 1040, LINE 10 * IF LINE 21 IS -0- OR MORE, USE AMOUNT FROM LINE 20 * IF LINE 21 IS A NEGATIVE AMOUNT, NET LINES 20 AND 21				0.
STATE AND LOCAL INCOME TAX REFUNDS PRIOR TO 2010					
TOTAL TO FORM 1040, LINE 10					0.

FORM 1040 TAX-EXEMPT INTEREST STATEMENT 4

NAME OF PAYER

AMOUNT

UBS #		59.
UBS #		6.
UBS #		5,563.
UBS #		3.

TOTAL TO FORM 1040, LINE 8B

5,631.

FORM 1040 REFUNDS ATTRIBUTABLE TO EST. TAX PAID FOLLOWING YR STATEMENT 5

	2012	STATE REFUND	AMOUNT SUBTRACTED FROM TAXABLE REFUND
CALIFORNIA			
STATE TAX PAID IN FOLLOW YEAR	25,000.		
	X	29,809. =	6,844.
TOTAL STATE TAX PAID 2012	108,880.		
GEORGIA			
STATE TAX PAID IN FOLLOW YEAR	300.		
	X	204. =	204.
TOTAL STATE TAX PAID 2012	300.		
ILLINOIS			
STATE TAX PAID IN FOLLOW YEAR	750.		
	X	214. =	214.
TOTAL STATE TAX PAID 2012	750.		
MISSOURI			
STATE TAX PAID IN FOLLOW YEAR	500.		
	X	35. =	35.
TOTAL STATE TAX PAID 2012	500.		
NEW MEXICO			
STATE TAX PAID IN FOLLOW YEAR	200.		
	X	7. =	7.
TOTAL STATE TAX PAID 2012	200.		

MARIANNE D. WILLIAMSON



NEW YORK

STATE TAX PAID IN FOLLOW YEAR 500.
TOTAL STATE TAX PAID 2012 500.

363. = 363.

OKLAHOMA

STATE TAX PAID IN FOLLOW YEAR 100.
TOTAL STATE TAX PAID 2012 100.

93. = 93.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 6

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
UBS # [REDACTED]	17,778.	12,325.
UBS # [REDACTED]	6,792.	6,792.
TOTAL INCLUDED IN FORM 1040, LINE 9B		19,117.



FORM 1040 SELF-EMPLOYED HEALTH INSURANCE DEDUCTION WORKSHEET STATEMENT 7

MARIANNE D. WILLIAMSON

MARIANNE WILLIAMSON

1	HEALTH INSURANCE PAYMENTS	21,911.
2	NET PROFIT FROM TRADE OR BUSINESS UNDER WHICH INSURANCE PLAN IS ESTABLISHED	700,545.
3	TOTAL OF ALL NET PROFITS AND EARNED INCOME .	700,545.
4	DIVIDE LINE 2 BY LINE 3	1.0000
5	DEDUCTIBLE PORTION OF SELF-EMPLOYMENT TAX. .	16,430.
6	LINE 4 TIMES LINE 5	16,430.
7	LINE 2 MINUS LINE 6	684,115.
8	SELF-EMPLOYED SEP, SIMPLE, AND QUALIFIED PLANS ATTRIBUTABLE TO TRADE OR BUSINESS NAMED ABOVE	0.
9	LINE 7 MINUS LINE 8	684,115.
10	FORM 2555, LINE 45 ATTRIBUTABLE TO THE TRADE OR BUSINESS NAMED ABOVE	
11	LINE 9 MINUS LINE 10	684,115.
12	SELF-EMPLOYED HEALTH INSURANCE DEDUCTION. LESSER OF LINE 1 OR LINE 11	21,911.

SCHEDULE A STATE AND LOCAL INCOME TAXES STATEMENT 8

DESCRIPTION	AMOUNT
CALIFORNIA 2ND QTR ESTIMATE PAYMENTS	7,000.
CALIFORNIA 4TH QTR ESTIMATE PAYMENTS	30,000.
CALIFORNIA PRIOR YEAR OVERPAYMENT APPLIED	29,491.
CALIFORNIA PRIOR YEAR BALANCE DUE AND EXTENSION PAYMENTS	25,000.
ILLINOIS PRIOR YEAR BALANCE DUE AND EXTENSION PAYMENTS	750.
MISSOURI PRIOR YEAR BALANCE DUE AND EXTENSION PAYMENTS	500.
NEW YORK PRIOR YEAR OVERPAYMENT APPLIED	160.
NEW YORK PRIOR YEAR ESTIMATE PAYMENTS	500.
REDUCTION OF STATE TAX DEDUCTION - STATE REFUNDS	-7,760.
TOTAL TO SCHEDULE A, LINE 5	85,641.



SCHEDULE A MEDICAL AND DENTAL EXPENSES STATEMENT 9

DESCRIPTION	AMOUNT
PRESCRIPTION MEDICINES AND DRUGS	1,628.
DOCTORS, DENTISTS, ETC.	7,383.
TOTAL TO SCHEDULE A, LINE 1	9,011.

SCHEDULE A	ITEMIZED DEDUCTIONS WORKSHEET	STATEMENT 10
1.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 9, 15, 19, 20, 27, AND 28	100,504.
2.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 14, AND 20, PLUS ANY GAMBLING AND CASUALTY OR THEFT LOSSES INCLUDED ON LINE 28.	0.
3.	IS THE AMOUNT ON LINE 2 LESS THAN THE AMOUNT ON LINE 1? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 2 FROM LINE 1	100,504.
4.	MULTIPLY LINE 3 BY 80% (.80).	80,403.
5.	ENTER THE AMOUNT FROM FORM 1040, LINE 38.	686,104.
6.	ENTER \$300,000 IF MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$275,000 IF HEAD OF HOUSEHOLD; \$250,000 IF SINGLE; OR \$150,000 IF MARRIED FILING SEPARATELY	275,000.
7.	IS THE AMOUNT ON LINE 6 LESS THAN THE AMOUNT ON LINE 5? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 6 FROM LINE 5	411,104.
8.	MULTIPLY LINE 7 BY 3% (.03)	12,333.
9.	ENTER THE SMALLER OF LINE 4 OR LINE 8	12,333.
10.	TOTAL ITEMIZED DEDUCTIONS. SUBTRACT LINE 9 FROM LINE 1. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 29	88,171.

SCHEDULE B	TAX-EXEMPT INTEREST FROM 1099-DIV	STATEMENT 11
NAME OF PAYER		AMOUNT
UBS #		59.
UBS #		6.
UBS #		3.
TOTAL TAX-EXEMPT INTEREST FROM 1099-DIV TO SCHEDULE B, LINE 5		68.



SCHEDULE C	CAR AND TRUCK EXPENSES	STATEMENT 12
DESCRIPTION		AMOUNT
VEHICLE NUMBER 1 - \$5993 GAS, OIL, REPAIRS, ETC. AT 80.00%		4,794.
TOTAL TO SCHEDULE C, LINE 9		4,794.

SCHEDULE C	OTHER EXPENSES	STATEMENT 13
DESCRIPTION		AMOUNT
SUBSCRIPTIONS		6,741.
POSTAGE		5,977.
TELEPHONE		9,102.
RESEARCH		1,306.
PROMOTION		5,096.
INTERNET		24,073.
OUTSIDE SERVICES		92,300.
BANK CHARGES		3,311.
BUSINESS MANAGEMENT		85,995.
WARDROBE		5,784.
EDITORIAL FEES		2,100.
TOTAL TO SCHEDULE C, LINE 48		241,785.

SCHEDULE C	OTHER COSTS OF GOODS SOLD	STATEMENT 14
DESCRIPTION		AMOUNT
CREDIT CARD FEES/CHARGEBACKS		12,695.
OTHER LECTURE EXPENSES		36,076.
THEATER RENTAL		97,950.
TOTAL TO SCHEDULE C, LINE 39		146,721.

SCHEDULE D CAPITAL GAIN DISTRIBUTIONS STATEMENT 15

NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
UBS # ████████	11,922.	
TOTALS TO SCHEDULE D, LINE 13	11,922.	

SCHEDULE D	CAPITAL LOSS CARRYOVER	STATEMENT 16
1. ENTER THE AMOUNT FROM FORM 1040, LINE 41		597,933.
2. ENTER THE LOSS FROM SCHEDULE D, LINE 21, AS A POSITIVE AMOUNT.		3,000.
3. COMBINE LINES 1 AND 2. IF ZERO OR LESS, ENTER -0-		600,933.
4. ENTER THE SMALLER OF LINE 2 OR LINE 3		3,000.
5. ENTER THE LOSS FROM SCHEDULE D, LINE 7, AS A POSITIVE AMOUNT .		
6. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 15		
7. ADD LINES 4 AND 6		
8. SHORT-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 7 FROM LINE 5. IF ZERO OR LESS, ENTER -0- . . .		
9. ENTER THE LOSS FROM SCHEDULE D, LINE 15, AS A POSITIVE AMOUNT.		338,674.
10. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 7	6,052.	
11. SUBTRACT LINE 5 FROM LINE 4. IF ZERO OR LESS, ENTER -0-	3,000.	
12. ADD LINES 10 AND 11		9,052.
13. LONG-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 12 FROM LINE 9. IF ZERO OR LESS, ENTER -0- . . .		329,622.

SCHEDULE SE	NON-FARM INCOME	STATEMENT 17
DESCRIPTION		AMOUNT
AUTHOR/LECTURER		700,545.
TOTAL TO SCHEDULE SE, LINE 2		700,545.



FORM 1116	WORLDWIDE CAPITAL GAINS WORKSHEET FOR LINE 18	STATEMENT 18
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1	ENTER THE AMOUNT FROM FORM 1040, LINE 41. IF YOU ARE A NONRESIDENT ALIEN, ENTER THE AMOUNT FROM FORM 1040NR, LINE 39	597,933.
2	ENTER WORLDWIDE 28% GAINS	
3	MULTIPLY LINE 2 BY 0.2929	
4	ENTER WORLDWIDE 25% GAINS	
5	MULTIPLY LINE 4 BY 0.3687	
6	ENTER WORLDWIDE 20% GAINS AND QUALIFIED DIVIDENDS	19,117.
7	MULTIPLY LINE 6 BY 0.4949	9,461.
8	ENTER WORLDWIDE 15% GAINS AND QUALIFIED DIVIDENDS	
9	MULTIPLY LINE 8 BY 0.6212	
10	ENTER WORLDWIDE 0% GAINS AND QUALIFIED DIVIDENDS	
11	ADD LINES 3, 5, 7, 9 AND 10	9,461.
12	SUBTRACT LINE 11 FROM LINE 1. ENTER THE RESULT HERE AND ON FORM 1116, LINE 18	588,472.

FORM 4797	NONRECAPTURED NET SECTION 1231 LOSSES FROM PRIOR YEARS	STATEMENT 19
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<u>TAX YEAR</u>	<u>SECTION 1231 LOSSES</u>	<u>SECTION 1231 LOSSES RECAPTURED</u>	<u>NONRECAPTURED SECTION 1231 LOSSES</u>
2008			
2009	36.	35.	1.
2010			
2011			
2012	148.		148.
TOTAL TO FORM 4797, LINE 8	184.	35.	149.

FORM 6251	PASSIVE ACTIVITIES	STATEMENT 20
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<u>NAME OF ACTIVITY</u>	<u>FORM</u>	<u>NET INCOME (LOSS)</u>		<u>ADJUSTMENT</u>
		<u>AMT</u>	<u>REGULAR</u>	
CEDAR FAIR LP - PTP	SCH E	-19.	-19.	0.
TOTAL TO FORM 6251, LINE 19				0.



FORM 6251 LINE 49 WORKSHEET STATEMENT 21

1 ENTER:
 \$400,000 IF SINGLE
 \$225,000 IF MARRIED FILING SEPARATELY
 \$450,000 IF MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER)
 \$425,000 IF HEAD OF HOUSEHOLD 425,000.

2 ENTER THE AMOUNT FROM FORM 6251, LINE 45 0.

3 ENTER THE AMOUNT FROM LINE 7 OF THE QUALIFIED DIVIDENDS
 AND CAPITAL GAIN TAX WORKSHEET IN THE INSTRUCTIONS FOR
 FORM 1040, LINE 44, OR THE AMOUNT FROM LINE 19 OF THE
 SCHEDULE D TAX WORKSHEET, WHICHEVER APPLIES (AS FIGURED
 FOR REGULAR TAX). IF YOU DID NOT COMPLETE EITHER
 WORKSHEET FOR THE REGULAR TAX, ENTER THE AMOUNT FROM FORM
 1040, LINE 43; BUT DO NOT ENTER LESS THAN -0-. IF YOU DID
 NOT COMPLETE EITHER WORKSHEET FOR THE REGULAR TAX AND YOU
 ARE FILING FORM 2555 OR FORM 2555-EZ, ENTER THE AMOUNT
 FROM LINE 3 OF THE FOREIGN EARNED INCOME TAX WORKSHEET IN
 THE FORM 1040 INSTRUCTIONS (AS FIGURED FOR THE REGULAR
 TAX) 578,816.

4 ADD LINE 2 AND LINE 3 578,816.

5 SUBTRACT LINE 4 FROM LINE 1 AND ENTER THE RESULT HERE AND ON
 LINE 49, BUT DO NOT ENTER LESS THAN -0- 0.

FORM 1116 ALTERNATIVE MINIMUM TAX FOREIGN TAX CREDIT STATEMENT 22
WORLDWIDE CAPITAL GAINS
WORKSHEET FOR LINE 18

1	ENTER THE AMOUNT FROM FORM 6251, LINE 28	671,241.
2	ENTER WORLDWIDE 25% GAINS	
3	MULTIPLY LINE 2 BY 0.1071	
4	ENTER WORLDWIDE 20% GAINS AND QUALIFIED DIVIDENDS	19,117.
5	MULTIPLY LINE 4 BY 0.2857	5,462.
6	ENTER WORLDWIDE 15% GAINS AND QUALIFIED DIVIDENDS	
7	MULTIPLY LINE 6 BY 0.4643	
8	ENTER WORLDWIDE 0% GAINS AND QUALIFIED DIVIDENDS	
9	ADD LINES 3, 5, 7 AND 8	5,462.
10	SUBTRACT LINE 9 FROM LINE 1. ENTER THE RESULT HERE AND ON FORM 1116 AMT, LINE 18	665,779.

FORM 1116 U.S. AND FOREIGN SOURCE INCOME SUMMARY STATEMENT 23
TOTAL PARTNERSHIP/S-CORPORATION INCOME/LOSS

DESCRIPTION	INCOME	LOSS
CEDAR FAIR LP		-19.
TOTAL PARTNERSHIP/S-CORPORATION INCOME/LOSS		-19.

FORM 1116

U.S. AND FOREIGN SOURCE INCOME SUMMARY
FOREIGN QUALIFIED DIVIDENDS

STATEMENT 24

DESCRIPTION	TOTAL DIVIDEND	QUALIFIED DIVIDEND	REDUCTION PERCENT	DIVIDEND TO LINE 1A	QUAL DIV ADJUSTMENT
UBS #	1,747.	1,747.	.5051	882.	865.
TOTALS	1,747.	1,747.		882.	865.