

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

CLAUDE A SIMON

Your social security number

106-50-1158

## Schedule B-Interest and Ordinary Dividends

Attachment  
Sequence No. 08Part I  
Interest(See page B-1  
and the  
instructions for  
Form 1040,  
line 8a.)

**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.

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

CITIBANK

WACHOVIA

AMERITRADE

160 MADISON AVE JOINT VENTURE

13-3027658

Amount

15

8

130

300

1

- 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 1040, line 8a ►

2

453

3

453

4

453

Amount

Part II  
Ordinary  
Dividends(See page B-1  
and the  
instructions for  
Form 1040,  
line 9a.)

**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.

- 5 List name of payer ►  
 NATIONAL FINANCIAL  
 ABERDEEN ASIA PACIFIC  
 Taxable Dividend Income  
 Tax-Exempt Dividend  
 BANC OF AMERICA  
 WACHOVIA  
 \*\* Subtotal \*\*  
 Tax-Exempt Dividend

1

2,081

347

1

2,833

5,263

-347

5

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

6

4,916

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

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

Yes

No

- Part III  
Foreign  
Accounts  
and Trusts
- 7a At any time during 2005, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? See page B-2 for exceptions and filing requirements for Form TD F 90-22.1

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

X

- (See  
page B-2.) 8 During 2005, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See page B-2

X