TD Ameritrade

Member FINRA/SIPC

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CLAUDE SIMON & CAROLYN JANE SIMON
JT TEN
534 W 42ND ST APT 8
NEW YORK, NY 10036-6221

1099 Guide for Tax Year 2018

Please visit www.tdameritrade.com/1099guide to access our helpful **1099 Information Guide**.

Go paperless

You can receive your tax documents electronically or by mail. If you choose electronic delivery, you will stop receiving paper tax documents. Instead, you'll get an email when your documents are available online with instructions on how to access and download them. To sign up for electronic delivery of your tax documents, please log in to your account and go to Client Services > My Profile > Communication Preferences.

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TD Ameritrade
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Tax Information
Account 866733665

Statement Date: 01/17/2019
Document ID: 554Q N4U 73Z0

2018

CLAUDE SIMON & CAROLYN JANE SIMON
JT TEN
534 W 42ND ST APT 8
NEW YORK, NY 10036-6221

PAYER'S TIN: 47-0533629
RECIPIENT'S TIN: XXX-XX-1158

[ ] **FATCA filing requirement (see instructions)**

Summary Information

DIVIDENDS AND DISTRIBUTIONS 2018 1099-DIV* OMB No. 1545-0110

1a- Total ordinary dividends (includes lines 1b, 5)	0.40
1b- Qualified dividends	0.40
2a- Total capital gain distributions (includes lines 2b, 2c, 2d)	0.00
2b- Unrecaptured Section 1250 gain	0.00
2c- Section 1202 gain	0.00
2d- Collectibles (28%) gain	0.00
3- Nondividend distributions	0.00
4- Federal income tax withheld	**0.00**
5- Section 199A dividends	0.00
6- Investment expenses	0.00
8- Foreign country or US possession: 7- Foreign tax paid:	0.00
9- Cash liquidation distributions	0.00
10- Noncash liquidation distributions	0.00
11- Exempt-interest dividends (includes line 12)	0.00
12- Specified private activity bond interest dividends (AMT)	0.00

MISCELLANEOUS INCOME 2018 1099-MISC* OMB No. 1545-0115

2- Royalties	0.00
3- Other income	0.00
4- Federal income tax withheld	**0.00**
8- Substitute payments in lieu of dividends or interest	0.00

SECTION 1256 CONTRACTS 2018 1099-B* OMB No. 1545-0715

8- Profit or (loss) realized in 2018 on closed contracts	0.00
9- Unrealized profit or (loss) on open contracts-12/31/2017	0.00
10- Unrealized profit or (loss) on open contracts-12/31/2018	0.00
11- Aggregate profit or (loss) on contracts	0.00

If applicable, proceeds from sale transactions appear summarized below and are detailed in subsequent sections of this document.

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

SUMMARY OF PROCEEDS, GAINS & LOSSES, ADJUSTMENTS AND WITHHOLDING

Refer to the 1099-B and Proceeds not reported to the IRS pages to ensure that you consider all relevant items and to determine the correct gains and losses. The amounts shown below are for informational purposes.

Term	Form 8949 type	Proceeds	Cost basis	Market discount	Wash sale loss disallowed	Net gain or loss(-)
Short	A (basis reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Short	B (basis not reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Short	C (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Short-term	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Long	D (basis reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Long	E (basis not reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Long	F (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Long-term	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Undetermined	B or E (basis not reported to the IRS)	0.00	0.00	0.00	0.00	0.00
Undetermined	C or F (Form 1099-B not received)	0.00	0.00	0.00	0.00	0.00
	Total Undetermined-term	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
	Grand total	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**

Withholding	Amount
Federal income tax withheld	0.00

Changes to dividend tax classifications processed after your original tax form is issued for 2018 may require an amended tax form.

TD Ameritrade Clearing, Inc. Account 866733665

2018

Summary Information
(continued)

01/17/2019

INTEREST INCOME 2018 1099-INT

OMB No. 1545-0112

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

1- Interest income (not included in line 3)	14.61
2- Early withdrawal penalty	0.00
3- Interest on US Savings Bonds & Treasury obligations	0.00
4- Federal income tax withheld	**0.00**
5- Investment expenses	0.00
7- Foreign country or US possession: 6- Foreign tax paid:	0.00
8- Tax-exempt interest (includes line 9)	0.00
9- Specified private activity bond interest (AMT)	0.00
10- Market discount (covered lots)	0.00
11- Bond premium (covered lots)	0.00
12- Bond premium on Treasury obligations (covered lots)	0.00
13- Bond premium on tax-exempt bonds (categorized below)	0.00
Tax-exempt obligations (covered lots)	0.00
Tax-exempt private activity obligations (AMT, covered lots)	0.00
14- Tax-exempt and tax credit bond CUSIP number	See detail

The following amounts are not reported to the IRS. They are presented here for your reference when preparing your tax return(s).

Taxable accrued interest paid	0.00
Taxable accrued Treasury interest paid	0.00
Tax-exempt accrued interest paid	0.00
Tax-exempt accrued interest paid (AMT)	0.00
Taxable accrued nonqualified interest paid	0.00
Tax-exempt accrued nonqualified interest paid	0.00
Tax-exempt accrued nonqualified interest paid (AMT)	0.00
Nonqualified interest	0.00
Tax-exempt nonqualified interest	0.00
Tax-exempt nonqualified interest (AMT)	0.00
Interest shortfall on contingent payment debt	0.00
Bond premium- Non Treasury obligations (noncovered lots)	0.00
Bond premium- Treasury obligations (noncovered lots)	0.00
Bond premium- Tax-exempt obligations (noncovered lots)	0.00
Bond premium- Tax-exempt obligations (AMT, noncovered lots)	0.00
Market discount (noncovered lots)	0.00

STATE TAX WITHHELD

Use the details of the State Tax Withholding page(s) to determine the appropriate amounts for your income tax return(s). The amounts shown in this section are for your reference.

1099-DIV total withheld	0.00
1099-INT total withheld	0.00
1099-OID total withheld	0.00
1099-MISC total withheld	0.00
1099-B total withheld	0.00

ORIGINAL ISSUE DISCOUNT AND ADJUSTMENTS

Use bond-by-bond details from the Form 1099-OID page(s) to determine amounts of Original Issue Discount income for your income tax return(s). The amounts shown in this section are for your reference when preparing your income tax return(s).

Original issue discount for 2018	0.00
Acquisition premium (covered lots)	0.00
Acquisition premium (noncovered lots)	0.00
Original issue discount on Treasury obligations	0.00
Acquisition premium, Treasury obligations (covered lots)	0.00
Acquisition premium, Treasury obligations (noncovered lots)	0.00
Tax-exempt OID	0.00
Tax-exempt OID (lots not reported)	0.00
Acquisition premium (covered)	0.00
Acquisition premium (lots not reported)	0.00
Tax-exempt OID on private activity bonds	0.00
Tax-exempt OID on private activity bonds (lots not reported)	0.00
Acquisition premium (AMT, covered)	0.00
Acquisition premium (AMT, lots not reported)	0.00
Market discount (all lots)	0.00
Early withdrawal penalty	0.00
Investment expenses	0.00

RECONCILIATIONS, FEES, EXPENSES AND EXPENDITURES

The amounts in this section are not reported to the IRS. They are presented here for your reference when preparing your income tax return(s).

Other Receipts & Reconciliations- Partnership distributions	242.00
Other Receipts & Reconciliations- Foreign tax paid- partnership	0.00
Other Receipts & Reconciliations- Return of principal	0.00
Other Receipts & Reconciliations- Deferred income payment	0.00
Other Receipts & Reconciliations- Deemed premium	0.00
Other Receipts & Reconciliations- Income accrual- UIT	0.00
Other Receipts & Reconciliations- Basis adjustments	0.00
Other Receipts & Reconciliations- Foreign tax pd beyond treaty	0.00
Fees & Expenses- Margin interest	0.00
Fees & Expenses- Dividends paid on short position	0.00
Fees & Expenses- Interest paid on short position	0.00
Fees & Expenses- Non reportable distribution expense	0.00
Fees & Expenses- Other expenses	0.00
Fees & Expenses- Severance tax	0.00
Fees & Expenses- Organizational expense	0.00
Fees & Expenses- Miscellaneous fees	0.00
Fees & Expenses- Tax-exempt investment expense	0.00
Foreign Exchange Gains & Losses- Foreign currency gain/loss	0.00

TD Ameritrade Clearing, Inc. Account 866733665

Detail for Dividends and Distributions

2018 01/17/2019

This section of your tax information statement contains the payment level detail of your taxable dividends, capital gains distributions, exempt-interest dividends, nondividend distributions and liquidation distributions. Also shown are the fair market values of any taxable stock dividends or noncash liquidation distributions.

Federal, state and foreign tax withheld and investment expenses are presented as negative amounts but do not net against the reportable income totals. All amounts are grouped by security, with the transactions listed in chronological order. Subtotals for each security are provided. For situations in which the tax character of a distribution (or part thereof) is different than at the time it was paid, endnotes are provided for further explanation.

Note that a payment characterized as a "Qualified dividend" is only issuer-qualified.

Security description	CUSIP and/or symbol	State	Date	Amount	Transaction type	Notes
PJT PARTNERS INC COM CL A	69343T107 PJT		03/21/18	0.10	Qualified dividend	
			06/20/18	0.10	Qualified dividend	
			09/19/18	0.10	Qualified dividend	
			12/19/18	0.10	Qualified dividend	
				0.40	**Total Dividends & distributions**	
				0.40	**Total Dividends & distributions**	

TD Ameritrade Clearing, Inc. Account 866733665

Detail for Interest Income

2018 01/17/2019

This section of your tax information statement contains the payment level detail of taxable interest and associated bond premium. Market discount will be shown here only if you have elected to recognize it currently rather than at the time of sale or maturity. Bond premium and market discount for covered tax lots are totaled on Form 1099-INT and reported to the IRS. For noncovered tax lots, they are totaled in the Adjustments to Interest and Original Issue Discount *and are not reported to the IRS.*

To provide a complete picture of activity for each investment, we also include here nonreportable transactions such as accrued interest paid on purchases and payment or receipt of nonqualified interest. Other amounts, such as federal, state and foreign tax withheld and investment expenses are shown as negative amounts but do not net against the reportable income totals.

Security description	CUSIP and/or symbol	Date	Amount	Transaction type	Notes
FDIC INSURED DEPOSIT ACCOUNT CORE NOT COVERED BY SIPC	9ZZZFD104 MMDA1	01/31/18	0.90	Interest- money mkt	
		02/28/18	0.81	Interest- money mkt	
		03/31/18	0.90	Interest- money mkt	
		04/30/18	1.08	Interest- money mkt	
		05/31/18	1.13	Interest- money mkt	
		06/30/18	1.09	Interest- money mkt	
		07/31/18	1.35	Interest- money mkt	
		08/31/18	1.36	Interest- money mkt	
		09/30/18	1.31	Interest- money mkt	
		10/31/18	1.55	Interest- money mkt	
		11/30/18	1.54	Interest- money mkt	
		12/31/18	1.59	Interest- money mkt	
			14.61	Total Interest	
			14.61	**Total Interest**	

TD Ameritrade Clearing, Inc. Account 866733665

Other Receipts and Reconciliations

2018 01/17/2019

This section of your tax information statement contains the detail of the year-to-year adjustments between cash distributions and reportable income for Unit Investment Trusts, reflecting the fact that income is recognized at the time it is received by the trust, rather than when a distribution is made.

Also shown are distributions whose tax impact will be defined by other documentation. In the case of partnership distributions, you will receive Schedules K-1 (Forms 1065) *directly from the partnership(s). For deferred income, the* Form 1099-DIV *issued in the following year will characterize the amounts received.*

These amounts are provided here to facilitate an accounting of all amounts received during the year and are totaled in the Reconciliations, Fees, Expenses and Expenditures *found in the Summary Information at the beginning of the statement.*

Security description	CUSIP and/or symbol	Date	Amount	Transaction type	Notes
BLACKSTONE GROUP LP COM UNIT LTD	09253U108 BX	02/20/18	49.80	Partnership distribution	
		02/20/18	12.70	Partnership distribution	
		02/20/18	10.20	Partnership distribution	
		02/20/18	9.90	Partnership distribution	
		02/20/18	1.30	Partnership distribution	
		02/20/18	1.10	Partnership distribution	
		05/07/18	11.20	Partnership distribution	
		05/07/18	9.50	Partnership distribution	
		05/07/18	6.90	Partnership distribution	
		05/07/18	5.00	Partnership distribution	
		05/07/18	1.70	Partnership distribution	
		05/07/18	0.40	Partnership distribution	
		05/07/18	0.30	Partnership distribution	
		08/06/18	17.70	Partnership distribution	
		08/06/18	11.70	Partnership distribution	
		08/06/18	9.70	Partnership distribution	
		08/06/18	6.90	Partnership distribution	
		08/06/18	6.60	Partnership distribution	
		08/06/18	4.40	Partnership distribution	
		08/06/18	1.00	Partnership distribution	
		11/05/18	20.00	Partnership distribution	
		11/05/18	13.70	Partnership distribution	
		11/05/18	9.20	Partnership distribution	
		11/05/18	6.10	Partnership distribution	
		11/05/18	5.10	Partnership distribution	
		11/05/18	5.10	Partnership distribution	
		11/05/18	4.80	Partnership distribution	
			242.00	Total Partnership distribution	
			242.00	Total Partnership distribution	

Instructions for Recipient

Common Instructions for Recipient

Recipient's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the issuer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the payer assigned to distinguish your account.

Backup Withholding. Shows backup withholding. Generally, a payer must backup withhold if you did not furnish your taxpayer identification number. See Form W-9 and Pub. 505 for more information. Report this amount on your income tax return as tax withheld.

Nominees. If this 1099 form includes amounts belonging to another person, you are considered a nominee recipient. You must file as the "payer" the respective Form 1099 (DIV, INT, or OID) Copy A (with a Form 1096) to the IRS for each of the other owners as recipient(s) to show their allocable share of the income and you must furnish the respective Copy B Form(s) and amounts to each owner. A spouse is not required to file a nominee return to show amounts owned by the other spouse. See the 2017 General Instructions for Certain Information Returns

FATCA filing requirement. If the FATCA filing requirement box is checked, the payer is reporting on Form 1099 to satisfy its chapter 4 account reporting requirement. You also may have a filing requirement. See the Instructions for Form 8938.

Keep tax documents for your records.

1099-DIV Instructions for Recipient

Line 1a. Shows total ordinary dividends that are taxable. Include this amount on the "Ordinary dividends" line of Form 1040. Also, report it on Schedule B (1040), if required.

Line 1b. Shows the portion of the amount on line 1a that may be eligible for reduced capital gains rates. See the Form 1040 instructions for how to determine this amount and where to report.

The amount shown may be dividends a corporation paid directly to you as a participant (or beneficiary of a participant) in an employee stock ownership plan (ESOP). Report it as a dividend on your Form 1040 but treat it as a plan distribution, not as investment income, for any other purpose.

Line 2a. Shows total capital gain distributions from a regulated investment company (RIC) or real estate investment trust (REIT). See *How To Report* in the Instructions for Schedule D (Form 1040). But, if no amount is shown on lines 2c-2d and your only capital gains and losses are capital gain distributions, you may be able to report the amounts shown on line 2a on your Form 1040 rather than Schedule D. See the Form 1040 instructions.

Line 2b. Shows the portion of the amount on line 2a that is unrecaptured section 1250 gain from certain depreciable real property. See the Unrecaptured Section 1250 Gain Worksheet--Line 19 in the Instructions for Schedule D (Form 1040).

Line 2c. Shows the portion of the amount on line 2a that is section 1202 gain from certain small business stock that may be subject to an exclusion. See the Schedule D (Form 1040) instructions.

Line 2d. Shows 28% rate gain from sales or exchanges of collectibles. If required, use this amount when completing the 28% Rate Gain Worksheet--Line 18 in the instructions for Schedule D (Form 1040).

Line 3. Shows the part of the distribution that is nontaxable because it is a return of your cost (or other basis). You must reduce your cost (or other basis) by this amount for figuring gain or loss when you sell your stock. But if you get back all your cost (or other basis), report future distributions as capital gains. See Pub. 550.

Line 4. See "Backup Withholding" section.

Line 5. Shows dividends eligible for the 20% qualified business income deduction under section 199A. See the Instructions for Form 1040.

Line 6. Shows your share of expenses of a nonpublicly offered RIC, generally a nonpublicly offered mutual fund. This amount is included on line 1a.

Line 7. Shows the foreign tax that you may be able to claim as a deduction or a credit on Form 1040. See the Form 1040 instructions.

Lines 8. This line should be left blank if a RIC reported the foreign tax shown on line 7.

Line 9 and 10. Shows cash and noncash liquidation distributions.

Line 11. Shows exempt-interest dividends from a mutual fund or other RIC paid to you during the calendar year. See the Instructions for Form 1040 for where to report. This amount may be subject to backup withholding. See *Line 4* above.

Line 12. Shows exempt-interest dividends subject to the alternative minimum tax. This amount is included on line 11. See the instructions for Form 6251.

Lines 13-15. State income tax withheld reporting lines.

1099-INT Instructions for Recipient

The information provided may be different for covered and noncovered securities. For a description of covered securities, see the Instructions for Form 8949. For a taxable covered security acquired at a premium, unless you notified the payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize the premium under section 171, or for a tax-exempt covered security acquired at a premium, your payer generally must report either (1) a net amount of interest that reflects the offset of the amount of interest paid to you by the amount of premium amortization allocable to the payment(s), or (2) a gross amount for both the interest paid to you and the premium amortization allocable to the payment(s). If you did notify your payer that you did not want to amortize the premium on a taxable covered security, then your payer will only report the gross amount of interest paid to you. For a noncovered security acquired at a premium, your payer is only required to report the gross amount of interest paid to you.

Line 1. Shows taxable interest paid to you during the calendar year by the payer. This does not include interest shown on line 3. May also show the total amount of the credits from clean renewable energy bonds, new clean renewable energy bonds, qualified energy conservation bonds, qualified zone academy bonds, qualified school construction bonds, and build America bonds that must be included in your interest income. These amounts were treated as paid to you during 2018 on the credit allowance dates (March 15, June 15, September 15, and December 15). For more information, see Form 8912. See the instructions above for a taxable covered security acquired at a premium.

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

Line 3. Shows interest on U.S. Savings Bonds, Treasury bills, Treasury bonds, and Treasury notes. This may or may not all be taxable. See Pub. 550. This interest is exempt from state and local income taxes. This interest is not included on line 1. See the instructions above for a taxable covered security acquired at a premium.

Line 4. Shows backup withholding. Generally, a payer must backup withhold if you did not furnish your taxpayer identification number (TIN) or you did not furnish the correct TIN to the payer. See Form W-9. Include this amount on your income tax return as tax withheld.

Line 5. Any amount shown is your share of investment expenses of a single-class REMIC. If you file Form 1040, you may deduct these expenses on the "Other expenses" line of Schedule A (Form 1040) subject to the 2% limit. This amount is included on line1.

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

Line 7. Shows the country or U.S. possession to which the foreign tax was paid.

Line 8. Shows tax-exempt interest paid to you during the calendar year by the payer. Report this amount on line 8b of Form 1040 or Form 1040A. This amount may be subject to backup withholding. See line 4. See the instructions above for a tax-exempt covered security acquired at a premium.

Line 9. Shows tax-exempt interest subject to the alternative minimum tax. This amount is included on line 8. See the Instructions for Form 6251. See the instructions above for a tax-exempt covered security acquired at a premium.

Line 10. For a taxable or tax-exempt covered security, if you made an election under section 1278(b) to include market discount in income as it accrues and you notified your payer of the election in writing in accordance with Regulations section 1.6045-1(n)(5), shows the market discount that accrued on the debt instrument during the year while held by you, unless it was reported on Form 1099-OID. For a taxable or tax-exempt covered security acquired on or after January 1, 2015, accrued market discount will be calculated on a constant yield basis unless you notified your payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to make a constant yield election for market discount under section 1276(b). Report the accrued market discount on your income tax return as directed in the instructions for Form 1040 or 1040A. Market discount on a tax-exempt security is includible in taxable income as interest income.

Line 11. For a taxable covered security (other than a U.S. Treasury obligation), shows the amount of premium amortization allocable to the interest payment(s), unless you notified the payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize bond premium under section 171. If an amount is reported on this line, see the Instructions for Form 1040 (Schedule B) to determine the net amount of interest includible in income on Form 1040 with respect to the security. If an amount is not reported on this line for a taxable covered security acquired at a premium and the payer is reporting premium amortization, the payer has reported a net amount of interest on line 1. If the amount in line 11 is greater than the amount of interest paid on the covered security, see Regulations section 1.171-2(a)(4).

Line 12. For a U.S. Treasury obligation that is a covered security, shows the amount of premium amortization allocable to the interest payment(s), unless you notified the payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize bond premium under section 171. If an amount is reported on this line, see the Instructions for Form 1040 (Schedule B) to determine the net amount of interest includible in income on Form 1040 with respect to the U.S. Treasury obligation. If an amount is not reported on this line for a U.S. Treasury obligation that is a covered security acquired at a premium and the payer is reporting premium amortization, the payer has reported a net amount of interest on line 3. If the amount on line 12 is greater than the amount of interest paid on the U.S. Treasury obligation, see Regulations section 1.171-2(a)(4).

Line 13. For a tax-exempt covered security, shows the amount of premium amortization allocable to the interest payment(s). If an amount is reported on this line, see Pub. 550 to determine the net amount of tax-exempt interest reportable on line 8b of Form 1040 or Form 1040A. If an amount is not reported on this line for a tax-exempt covered security acquired at a premium, the payer has reported a net amount of interest on line 8 or 9, whichever is applicable. If the amount on line 13 is greater than the amount of interest paid on the tax-exempt covered security, the excess is a nondeductible loss. See Regulations section 1.171-2(a)(4)(ii).

Line 14. Shows CUSIP number(s) for tax-exempt bond(s) on which tax-exempt interest was paid, or tax credit bond(s) on which taxable interest was paid or tax credit was allowed, to you during the calendar year. If blank, no CUSIP number was issued for the bond(s).

Line 15--17. State tax withheld reporting lines.

Department of the Treasury
Internal Revenue Service
Kansas City, MO 64999-0025

Notice	CP80
Tax Year	2013
Notice date	December 19, 2016
Social Security number	XXX-XX-5808
To contact us	1-800-829-0922
Your Caller ID	
Page 1 of 1	9H

041037.717995.48353.7183 1 AT 0.399 370

JOHN DECD & VICKI SIMON
% VICKI SIMON
6 EDWARDS LN
GLEN COVE NY 11542-3209

041037

We haven't received your tax return

Credit on account: $324.00

We've credited payments and/or other credits to your tax account for the tax year shown above. However, we haven't received your tax return.

What you need to do immediately

If you are required to file this tax return:

- Please file today. Send your signed tax return to the address shown above. We'll apply the credit to the tax you owe and refund any overpayment if you owe no other taxes or obligations.

If you have already filed this return:

- Please send a newly-signed copy to the address shown above. Be sure to attach copies of all schedules and other documents you included with the original return.

If you would like the credit transferred to another tax form, tax year or tax identification number:

- Call us at 1-800-829-0922 to give us the details of the account to which the credit should be transferred.

If we don't hear from you

If you don't file your return or contact us, you may lose this credit. The Internal Revenue Code sets strict time limits for refunding or transferring credits.

Additional information

- Visit www.irs.gov/cp80
- For tax forms, instructions, and publications, visit www.irs.gov or call 1-800-TAX FORM (1-800-829-3676).
- Keep this notice for your records.

If you need assistance, please don't hesitate to contact us.

SCANNED