

File by Mail Instructions for your 2015 Federal Tax Return

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



(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Antone R & Pamela G Escobar
1514 Diamond Street
Springfield, OR 97477

Balance Due/Refund	Your federal tax return (Form 1040) shows you owe a balance due of \$3,945.00. You are paying by check.		
What You Need to Mail	Your tax return - The official return for mailing is included in this printout. Remember to sign and date the return. Your payment - Mail a check or money order for \$3,945.00, payable to "United States Treasury". Write your Social Security number and "2015 Form 1040" on the check. Mail the return and check together. Attach the first copy or Copy B of Form(s) 1099-R to the front of your Form 1040. Mail your return, attachments and payment to: Internal Revenue Service P.O. Box 7704 San Francisco, CA 94120-7704 Deadline: Postmarked by Monday, April 18, 2016 Note: Your state return may be due on a different date. Please review your state filing instructions. Don't forget correct postage on the envelope.		
What You Need to Keep	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select File tab, then select the Print for Your Records category.		
2015 Federal Tax Return Summary	Adjusted Gross Income	\$	72,447.00
	Taxable Income	\$	42,538.00
	Total Tax	\$	4,879.00
	Total Payments/Credits	\$	934.00
	Payment Due	\$	3,945.00
	Effective Tax Rate		6.73%

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Antone R & Pamela G Escobar
1514 Diamond Street
Springfield, OR 97477

Estimated Payments to Make for Next Year's Return

Estimated Payments for 2016 - Do not mail these vouchers with your 2015 income tax return. The estimated vouchers displayed below are used to prepay your 2016 income taxes that will be filed next year. If you expect to owe more than \$1,000 in 2016, you may incur underpayment penalties if you do not make these four estimated tax payments. This printout includes your estimated tax vouchers for your federal estimated taxes (Form 1040-ES).

Mail payments according to the schedule below:

Voucher Number	Due Date	Amount
1	04/18/2016	\$ 987.00
2	06/15/2016	\$ 987.00
3	09/15/2016	\$ 987.00
4	01/17/2017	\$ 987.00

Include a separate check or money order for each payment, payable to "United States Treasury". Write your social security number and "Form 1040-ES" on each check.

Mail payments to:
Internal Revenue Service
P.O. Box 510000
San Francisco, CA 94151-5100

Changed Your Mind About e-filing?

You can still file electronically. Just go back to TurboTax, select the File tab, then select the E-file category. We'll walk you through the process. Once you file, we will let you know if your return is accepted (or rejected) by the Internal Revenue Service.

----- ▼ Detach Here and Mail With Your Payment ▼ -----

Department of the Treasury
Internal Revenue Service

Calendar Year —
Due **04/18/2016**

2016 Form 1040-ES Payment Voucher 1

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2016 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order ▶

987.

REV 12/04/15 TTMAC

1555

035-24-6444
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET
SPRINGFIELD OR 97477

036-26-3957

INTERNAL REVENUE SERVICE
PO BOX 510000
SAN FRANCISCO CA 94151-5100

035246444 LH ESCO 30 0 201612 430

----- ▼ Detach Here and Mail With Your Payment ▼ -----

Department of the Treasury
Internal Revenue Service

Calendar Year—
Due **06/15/2016**

2016 Form 1040-ES Payment Voucher 2

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2016 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order ▶

987.

REV 12/04/15 TTMAC

1555

035-24-6444
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET
SPRINGFIELD OR 97477

036-26-3957

INTERNAL REVENUE SERVICE
PO BOX 510000
SAN FRANCISCO CA 94151-5100

035246444 LH ESCO 30 0 201612 430

----- ▼ Detach Here and Mail With Your Payment ▼ -----

Department of the Treasury
Internal Revenue Service

Calendar Year—
Due **09/15/2016**

2016 Form 1040-ES Payment Voucher 3

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2016 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order ▶

987.

REV 12/04/15 TTMAC

1555

035-24-6444
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET
SPRINGFIELD OR 97477

036-26-3957

INTERNAL REVENUE SERVICE
PO BOX 510000
SAN FRANCISCO CA 94151-5100

035246444 LH ESCO 30 0 201612 430

----- ▼ Detach Here and Mail With Your Payment ▼ -----

Department of the Treasury
Internal Revenue Service

Calendar Year—
Due 01/17/2017

2016 Form 1040-ES Payment Voucher 4

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to the **'United States Treasury.'** Write your social security number and '2016 Form 1040-ES' on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

Amount of estimated tax
you are paying by check
or money order ▶

987.

REV 12/04/15 TTMAC 1555

035-24-6444 036-26-3957
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET
SPRINGFIELD OR 97477

INTERNAL REVENUE SERVICE
PO BOX 510000
SAN FRANCISCO CA 94151-5100

035246444 LH ESCO 30 0 201612 430

IF you live in . . .	THEN use this address to send in your payment . . .
Florida, Louisiana, Mississippi, Texas	Internal Revenue Service P.O. Box 1214 Charlotte, NC 28201-1214
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming	Internal Revenue Service P.O. Box 7704 San Francisco, CA 94120-7704
Arkansas, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Wisconsin	Internal Revenue Service P.O. Box 802501 Cincinnati, OH 45280-2501
Alabama, Georgia, Kentucky, New Jersey, North Carolina, South Carolina, Tennessee, Virginia	Internal Revenue Service P.O. Box 931000 Louisville, KY 40293-1000
Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New York, Pennsylvania, Rhode Island, Vermont, West Virginia	Internal Revenue Service P.O. Box 37008 Hartford, CT 06176-7008
A foreign country, American Samoa, or Puerto Rico (or are excluding income under Internal Revenue Code 933), or use an APO or FPO address, or file Form 2555, 2555-EZ, or 4563, or are a dual-status alien or nonpermanent resident of Guam or the U.S. Virgin Islands.	Internal Revenue Service P.O. Box 1303 Charlotte, NC 28201-1303

TO PAY YOUR TAXES DUE BY CHECK, MAIL THIS FORM TO THE ADDRESS LISTED BELOW.

▼ Detach Here and Mail With Your Payment and Return ▼

Form 1040-V (2015)

Department of the Treasury
Internal Revenue Service (99)

2015

Form 1040-V Payment Voucher

- ▶ Use this voucher when making a payment with Form 1040.
- ▶ Do not staple this voucher or your payment to Form 1040.
- ▶ Make your check or money order payable to the 'United States Treasury.'
- ▶ Write your social security number (SSN) on your check or money order.

Enter the amount
of your payment ▶

3,945.

REV 12/04/15 TTMAC 1555

ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET
SPRINGFIELD OR 97477

INTERNAL REVENUE SERVICE
P.O. BOX 7704
SAN FRANCISCO, CA 94120-7704

035246444 LH ESCO 30 0 201512 610

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning , 2015, ending , 20		See separate instructions.
Your first name and initial Antone R	Last name Escobar	Your social security number 035-24-6444
If a joint return, spouse's first name and initial Pamela G	Last name Escobar	Spouse's social security number 036-26-3957
Home address (number and street). If you have a P.O. box, see instructions. 1514 Diamond Street		Apt. no. ▲ Make sure the SSN(s) above and on line 6c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Springfield OR 97477		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
Foreign country name	Foreign province/state/county	Foreign postal code

Filing Status

1 ☐ Single	4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
2 ☒ Married filing jointly (even if only one had income)	5 ☐ Qualifying widow(er) with dependent child
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶	

Check only one box.

Exemptions

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a	Boxes checked on 6a and 6b 2
b ☒ Spouse	
c Dependents:	
(1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) ☒ if child under age 17 qualifying for child tax credit (see instructions)	No. of children on 6c who: • lived with you • did not live with you due to divorce or separation (see instructions)
If more than four dependents, see instructions and check here ▶ ☐	Dependents on 6c not entered above
d Total number of exemptions claimed	Add numbers on lines above ▶ 2

Income	7 Wages, salaries, tips, etc. Attach Form(s) W-2	7	
	8a Taxable interest. Attach Schedule B if required	8a	5,715.
	b Tax-exempt interest. Do not include on line 8a	8b	1,505.
	9a Ordinary dividends. Attach Schedule B if required	9a	7,993.
	b Qualified dividends	9b	3,849.
	10 Taxable refunds, credits, or offsets of state and local income taxes	10	313.
	11 Alimony received	11	
	12 Business income or (loss). Attach Schedule C or C-EZ	12	
	13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐	13	-3,000.
	14 Other gains or (losses). Attach Form 4797	14	
	15a IRA distributions	15a	
	b Taxable amount	15b	1,736.
	16a Pensions and annuities	16a	11,585.
	b Taxable amount	16b	10,523.
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	24,110.	
18 Farm income or (loss). Attach Schedule F	18		
19 Unemployment compensation	19		
20a Social security benefits	20a	35,050.	
b Taxable amount	20b	25,057.	
21 Other income. List type and amount	21		
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	72,447.	

Adjusted Gross Income	23 Educator expenses	23	
	24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
	25 Health savings account deduction. Attach Form 8889	25	
	26 Moving expenses. Attach Form 3903	26	
	27 Deductible part of self-employment tax. Attach Schedule SE	27	
	28 Self-employed SEP, SIMPLE, and qualified plans	28	
	29 Self-employed health insurance deduction	29	
	30 Penalty on early withdrawal of savings	30	
	31a Alimony paid b Recipient's SSN ▶	31a	
	32 IRA deduction	32	
	33 Student loan interest deduction	33	
	34 Tuition and fees. Attach Form 8917	34	
	35 Domestic production activities deduction. Attach Form 8903	35	
	36 Add lines 23 through 35	36	
37 Subtract line 36 from line 22. This is your adjusted gross income ▶	37	72,447.	

REV 12/30/15 TTMac Form **1040** (2015)

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Itemized Deductions

► Information about Schedule A and its separate instructions is at www.irs.gov/schedulea.
► Attach to Form 1040.

OMB No. 1545-0074

2015
Attachment
Sequence No. **07**

Name(s) shown on Form 1040

Antone R & Pamela G Escobar

Your social security number

035-24-6444

Medical and Dental Expenses		Caution: Do not include expenses reimbursed or paid by others.			
1	Medical and dental expenses (see instructions)	1	12,312.		
2	Enter amount from Form 1040, line 38 2 72,447.				
3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1951, multiply line 2 by 7.5% (.075) instead	3	5,434.		
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	6,878.		
Taxes You Paid		State and local (check only one box):			
a	☒ Income taxes, or	5	313.		
b	☐ General sales taxes	6	3,607.		
6	Real estate taxes (see instructions)	7			
7	Personal property taxes	8	158.		
8	Other taxes. List type and amount ► Foreign Taxes Int Div	9	4,078.		
9	Add lines 5 through 8				
Interest You Paid		10	9,508.		
10	Home mortgage interest and points reported to you on Form 1098	11			
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 ►	12			
12	Points not reported to you on Form 1098. See instructions for special rules	13			
13	Mortgage insurance premiums (see instructions)	14			
14	Investment interest. Attach Form 4952 if required. (See instructions.)	15	9,508.		
15	Add lines 10 through 14				
Gifts to Charity		16	1,445.		
16	Gifts by cash or check. If you made any gift of \$250 or more, see instructions.	17			
17	Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	18			
18	Carryover from prior year	19	1,445.		
19	Add lines 16 through 18				
Casualty and Theft Losses		20			
20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)				
Job Expenses and Certain Miscellaneous Deductions		21			
21	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►	22			
22	Tax preparation fees	23			
23	Other expenses—investment, safe deposit box, etc. List type and amount ►	24			
24	Add lines 21 through 23	25			
25	Enter amount from Form 1040, line 38 25	26			
26	Multiply line 25 by 2% (.02)	27			
27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-				
Other Miscellaneous Deductions		28			
28	Other—from list in instructions. List type and amount ►				
Total Itemized Deductions		29	21,909.		
29	Is Form 1040, line 38, over \$154,950? X 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. ☐ Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.				
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)

Interest and Ordinary Dividends

► Attach to Form 1040A or 1040.

► Information about Schedule B and its instructions is at www.irs.gov/scheduleb.

OMB No. 1545-0074

2015
Attachment
Sequence No. **08**

Name(s) shown on return

Antone R & Pamela G Escobar

Your social security number

035-24-6444

Part I
Interest

(See instructions on back and the instructions for Form 1040A, or 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 instructions on back and list this interest first. Also, show that buyer's social security number and address ►

EDWARD JONES

Selco Credit Union

Brandt Financial Services

Amount

2,985.76

30.27

2,699.

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 1040A, or Form 1040, line 8a ►

5,715.03

3

5,715.03

4

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

Amount

Part II
Ordinary Dividends

(See instructions on back and the instructions for Form 1040A, or 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 ► EDWARD JONES
EDWARD JONES

5,949.28

2,043.60

5

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

7,992.88

6

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

Part III
Foreign Accounts and Trusts

(See instructions on back.)

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 2015, 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

Yes	No
	X

If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements

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

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- 8** During 2015, 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 on back

	X
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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

2015
Attachment
Sequence No. **12**

Name(s) shown on return

Antone R & Pamela G Escobar

Your social security number

035-24-6444

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	6,141.	6,247.	1.	-105.
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 the back				7 -105.

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	44,235.	44,276.		-41.
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	82,804.	82,340.	32.	496.
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 the instructions				13 6,679.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 (37,438.)
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on the back				15 -30,304.

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-30,409.
	• 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? ☐ Yes. Go to line 18. ☐ 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? ☐ 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. ☐ 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: • The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500) } 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? ☒ 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). ☐ No. Complete the rest of Form 1040 or Form 1040NR.		

Sales and Other Dispositions of Capital Assets

► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.
► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Name(s) shown on return

Social security number or taxpayer identification number

Antone R & Pamela G Escobar

035-24-6444

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part I Short-Term. Transactions involving capital assets you held 1 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 totals directly on Schedule D, line 1a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	82.04	95.46			-13.42
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	905.46	976.48			-71.02
	FRANKLIN MUT QUEST FD CL A	12/18/15	12/29/15	738.58	850.55			-111.97
	TEMPLETON GLBL BALANCED CL A	Various	12/29/15	912.93	1,030.78			-117.85
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	364.53	394.82			-30.29
	BRIDGE BUILDER CORE BOND	02/04/15	08/21/15	300.	302.84	W	0.67	-2.17
	BRIDGE BUILDER CORE BOND	02/04/15	09/23/15	300.	304.04	W	0.45	-3.59
	BRIDGE BUILDER SMALLMID VALUE	05/20/15	06/23/15	300.	297.35			2.65
	CAPITAL WORLD GRW & INCOME F1	Various	07/13/15	134.44	94.94			39.50
	COLUMBIA MID CAP VALUE	Various	05/20/15	984.63	853.56			131.07
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	230.17	237.46			-7.29
	JP MORGAN CORE BOND	Various	02/04/15	187.68	183.87			3.81
	OPPENHEIMER RISING DIVIDEND	Various	05/20/15	550.81	474.43			76.38
	T. ROWE PRICE NEW INCOME	Various	07/13/15	149.33	150.09			-0.76
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 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				6,140.60	6,246.67		1.12	-104.95

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	71.38	83.05			-11.67
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	641.53	691.87			-50.34
	FRANKLIN MUT QUEST FD CL A	Various	12/29/15	8,622.07	9,929.13			-1,307.06
	TEMPLETON GLBL BALANCED CL A	Various	12/29/15	13,256.99	14,968.41			-1,711.42
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	1,726.18	1,869.59			-143.41
	HARBOR CAPITAL APPRECIATION	01/18/13	03/23/15	300.	215.46			84.54
	HARBOR CAPITAL APPRECIATION	01/18/13	07/23/15	300.	203.90			96.10
	T ROWE PRICE INSTL LRGE CP GR	06/06/13	11/23/15	300.	212.95			87.05
	MAINSTAY HIGH YIELD CORP BD	05/24/12	10/23/15	300.	314.08			-14.08
	OPPENHEIMER INTL GROWTH	01/29/13	02/23/15	300.	258.88			41.12
	CAPITAL WORLD GRW & INCOME F1	Various	07/13/15	5,952.84	4,203.81			1,749.03
	COLUMBIA MID CAP VALUE	Various	05/20/15	2,893.84	2,508.67			385.17
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	1,032.18	1,064.87			-32.69
	JP MORGAN CORE BOND	Various	02/04/15	1,331.04	1,304.			27.04
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) ▶				37,028.05	37,828.67			-800.62

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

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

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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.

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☐ **(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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	OPPENHEIMER RISING DIVIDEND	Various	05/20/15	5,539.41	4,771.26			768.15
	T. ROWE PRICE NEW INCOME	Various	07/13/15	1,667.66	1,676.21			-8.55
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) ►				7,207.07	6,447.47			759.60

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.

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Social security number or taxpayer identification number

Antone R & Pamela G Escobar**035-24-6444**

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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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERICAN BALANCED FUND CL A	Various	01/16/15	225.	125.71			99.29
	AMERICAN BALANCED FUND CL A	Various	02/19/15	225.	122.91			102.09
	AMERICAN BALANCED FUND CL A	Various	03/19/15	225.	123.84			101.16
	AMERICAN BALANCED FUND CL A	Various	04/17/15	225.	123.78			101.22
	AMERICAN BALANCED FUND CL A	Various	05/19/15	225.	122.51			102.49
	AMERICAN BALANCED FUND CL A	Various	06/19/15	225.	123.74			101.26
	AMERICAN BALANCED FUND CL A	Various	07/17/15	225.	123.19			101.81
	AMERICAN BALANCED FUND CL A	Various	08/19/15	225.	124.90			100.10
	AMERICAN BALANCED FUND CL A	Various	09/18/15	225.	129.94			95.06
	AMERICAN BALANCED FUND CL A	Various	10/19/15	225.	125.56			99.44
	AMERICAN BALANCED FUND CL A	Various	11/19/15	225.	123.29			101.71
	AMERICAN BALANCED FUND CL A	Various	12/18/15	225.	126.06			98.94
	FRANKLIN EQUITY INCOME FUND A	Various	01/16/15	150.	81.06			68.94
	FRANKLIN EQUITY INCOME FUND A	Various	02/19/15	150.	78.47			71.53
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) ▶				3,000.	1,654.96			1,345.04

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.

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Social security number or taxpayer identification number

Antone R & Pamela G Escobar**035-24-6444**

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Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

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☐ **(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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN EQUITY INCOME FUND A	Various	03/19/15	150.	79.48			70.52
	FRANKLIN EQUITY INCOME FUND A	Various	04/17/15	150.	79.66			70.34
	FRANKLIN EQUITY INCOME FUND A	Various	05/19/15	150.	78.26			71.74
	FRANKLIN EQUITY INCOME FUND A	Various	06/19/15	150.	79.34			70.66
	FRANKLIN EQUITY INCOME FUND A	Various	07/17/15	150.	79.52			70.48
	FRANKLIN EQUITY INCOME FUND A	Various	08/19/15	150.	81.13			68.87
	FRANKLIN EQUITY INCOME FUND A	Various	09/18/15	150.	84.88			65.12
	FRANKLIN EQUITY INCOME FUND A	Various	10/19/15	150.	81.60			68.40
	FRANKLIN EQUITY INCOME FUND A	Various	11/19/15	150.	80.53			69.47
	FRANKLIN EQUITY INCOME FUND A	Various	12/18/15	150.	86.04			63.96
	FRANKLIN GWTH ALLOC FD CL A	Various	01/16/15	225.	127.91			97.09
	FRANKLIN GWTH ALLOC FD CL A	Various	02/19/15	225.	123.35			101.65
	FRANKLIN GWTH ALLOC FD CL A	Various	03/19/15	225.	122.64			102.36
	FRANKLIN GWTH ALLOC FD CL A	Various	04/17/15	225.	121.75			103.25
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) ►				2,400.	1,306.09			1,093.91

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.

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Social security number or taxpayer identification number

Antone R & Pamela G Escobar**035-24-6444**

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Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN GWTH ALLOC FD CL A	Various	05/19/15	225.	120.32			104.68
	FRANKLIN GWTH ALLOC FD CL A	Various	06/19/15	225.	121.56			103.44
	FRANKLIN GWTH ALLOC FD CL A	Various	07/17/15	225.	125.65			99.35
	FRANKLIN GWTH ALLOC FD CL A	Various	08/19/15	225.	128.46			96.54
	FRANKLIN GWTH ALLOC FD CL A	Various	09/18/15	225.	134.11			90.89
	FRANKLIN GWTH ALLOC FD CL A	Various	10/19/15	225.	131.85			93.15
	FRANKLIN GWTH ALLOC FD CL A	Various	11/19/15	225.	130.90			94.10
	FRANKLIN GWTH ALLOC FD CL A	Various	12/18/15	225.	135.11			89.89
	AMERICAN INTL GRW & INC A	Various	01/16/15	170.	122.27			47.73
	AMERICAN INTL GRW & INC A	Various	02/19/15	170.	117.70			52.30
	AMERICAN INTL GRW & INC A	Various	03/19/15	170.	120.30			49.70
	AMERICAN INTL GRW & INC A	Various	04/17/15	170.	116.88			53.12
	AMERICAN INTL GRW & INC A	Various	05/19/15	170.	114.92			55.08
	AMERICAN INTL GRW & INC A	Various	06/19/15	170.	118.02			51.98
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) ▶				2,820.	1,738.05			1,081.95

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Social security number or taxpayer identification number

Antone R & Pamela G Escobar**035-24-6444**

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERICAN INTL GRW & INC A	Various	07/17/15	170.	118.75			51.25
	AMERICAN INTL GRW & INC A	Various	08/19/15	170.	125.14			44.86
	AMERICAN INTL GRW & INC A	Various	09/18/15	170.	133.37			36.63
	AMERICAN INTL GRW & INC A	Various	10/19/15	170.	129.31			40.69
	AMERICAN INTL GRW & INC A	Various	11/19/15	170.	131.64			38.36
	AMERICAN INTL GRW & INC A	Various	12/18/15	169.93	137.77			32.16
	AMERICAN INTL GRW & INC A	Various	12/18/15	0.07	0.05			0.02
	FRANKLIN MUT QUEST FD CL A	Various	01/16/15	150.	150.71	W	0.71	0.
	FRANKLIN MUT QUEST FD CL A	Various	02/19/15	150.	145.18			4.82
	FRANKLIN MUT QUEST FD CL A	Various	03/19/15	150.	144.65			5.35
	FRANKLIN MUT QUEST FD CL A	Various	04/17/15	150.	142.48			7.52
	FRANKLIN MUT QUEST FD CL A	Various	05/19/15	150.	142.65			7.35
	FRANKLIN MUT QUEST FD CL A	Various	06/19/15	150.	144.65			5.35
	FRANKLIN MUT QUEST FD CL A	Various	07/17/15	150.	146.25			3.75
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) ▶				2,070.	1,792.60		0.71	278.11

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.

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Antone R & Pamela G Escobar**035-24-6444**

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN MUT QUEST FD CL A	Various	08/19/15	150.	150.33	W	0.33	0.
	FRANKLIN MUT QUEST FD CL A	Various	09/18/15	150.	157.19	W	4.69	-2.50
	FRANKLIN MUT QUEST FD CL A	Various	10/19/15	150.	157.71			-7.71
	FRANKLIN MUT QUEST FD CL A	Various	11/19/15	150.	155.65	W	5.65	0.
	FRANKLIN MUT QUEST FD CL A	Various	12/18/15	150.	168.45	W	18.45	0.
	TEMPLETON GLOBAL BOND FUND A	Various	01/16/15	132.	124.12			7.88
	TEMPLETON GLOBAL BOND FUND A	Various	02/19/15	132.	125.32			6.68
	TEMPLETON GLOBAL BOND FUND A	Various	03/19/15	132.	125.72			6.28
	TEMPLETON GLOBAL BOND FUND A	Various	04/17/15	132.	124.01			7.99
	TEMPLETON GLOBAL BOND FUND A	Various	05/19/15	132.	124.12			7.88
	TEMPLETON GLOBAL BOND FUND A	Various	06/19/15	132.	126.13			5.87
	TEMPLETON GLOBAL BOND FUND A	Various	07/17/15	132.	125.83			6.17
	TEMPLETON GLOBAL BOND FUND A	Various	08/19/15	132.	131.94			0.06
	TEMPLETON GLOBAL BOND FUND A	Various	09/18/15	132.	133.76	W	1.25	-0.51
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) ▶				1,938.	1,930.28		30.37	38.09

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	TEMPLETON GLOBAL BOND FUND A	Various	10/19/15	132.	132.73	W	0.26	-0.47
	TEMPLETON GLOBAL BOND FUND A	Various	11/19/15	132.	129.41			2.59
	TEMPLETON GLOBAL BOND FUND A	Various	12/18/15	132.	133.64	W	0.58	-1.06
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	1,224.85	1,485.54			-260.69
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	18,648.99	20,735.21			-2,086.22
	FRANKLIN MUT QUEST FD CL A	Various	12/29/15	14,390.45	15,878.91			-1,488.46
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	15,903.49	16,060.13			-156.64
	DODGE & COX INTL STOCK	03/02/11	01/23/15	300.	251.53			48.47
	DODGE & COX INTL STOCK	03/02/11	05/22/15	300.	233.91			66.09
	INVESTMENT CO OF AMER CL F1	03/02/11	12/23/15	300.	257.37			42.63
	MFS RESEARCH INTERNATIONAL	03/02/11	04/23/15	300.	261.98			38.02
	COLUMBIA MID CAP VALUE	Various	05/20/15	2,169.03	1,722.87			446.16
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	1,275.17	1,738.97			-463.80
	DODGE & COX INCOME	03/02/11	02/04/15	3,454.24	3,316.89			137.35
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) ►				58,662.22	62,339.09		0.84	-3,676.03

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	JP MORGAN CORE BOND	Various	02/04/15	5,647.01	5,427.48			219.53
	T. ROWE PRICE NEW INCOME	03/02/11	02/04/15	4,632.61	4,511.06			121.55
	T. ROWE PRICE NEW INCOME	Various	07/13/15	1,634.17	1,640.22			-6.05
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) ▶				11,913.79	11,578.76			335.03

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.

SCHEDULE E
(Form 1040)

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

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

► Attach to Form 1040, 1040NR, or Form 1041.

► Information about Schedule E and its separate instructions is at www.irs.gov/schedulee.

OMB No. 1545-0074

2015
Attachment
Sequence No. **13**

Antone R & Pamela G Escobar

Your social security number
035-24-6444

Part I **Income or Loss From Rental Real Estate and Royalties** **Note:** If you are in the business of renting personal property, use **Schedule C or C-EZ** (see instructions). If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

A Did you make any payments in 2015 that would require you to file Form(s) 1099? (see instructions) ☐ Yes ☒ No
B If "Yes," did you or will you file required Forms 1099? ☐ Yes ☐ No

1a	Physical address of each property (street, city, state, ZIP code)				
A	5275 Lynridge Drive Yorba Linda CA 92886				
B					
C					
1b	Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
A	1	A	365	0	☐
B		B			☐
C		C			☐

Type of Property:

- | | | | |
|---------------------------|------------------------------|-------------|--------------------|
| 1 Single Family Residence | 3 Vacation/Short-Term Rental | 5 Land | 7 Self-Rental |
| 2 Multi-Family Residence | 4 Commercial | 6 Royalties | 8 Other (describe) |

Income:	Properties:	A	B	C
3 Rents received	3	30,000.		
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions.	8			
9 Insurance	9	626.		
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest.	13			
14 Repairs.	14	1,187.		
15 Supplies	15			
16 Taxes	16	2,112.		
17 Utilities.	17	27.		
18 Depreciation expense or depletion	18	1,938.		
19 Other (list) ►	19			
20 Total expenses. Add lines 5 through 19	20	5,890.		
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	24,110.		
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	()	()	()
23a Total of all amounts reported on line 3 for all rental properties	23a	30,000.		
b Total of all amounts reported on line 4 for all royalty properties	23b			
c Total of all amounts reported on line 12 for all properties	23c			
d Total of all amounts reported on line 18 for all properties	23d	1,938.		
e Total of all amounts reported on line 20 for all properties	23e	5,890.		
24 Income. Add positive amounts shown on line 21. Do not include any losses	24		24,110.	
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25	()		
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26		24,110.	

File by Mail Instructions for your 2015 Oregon Tax Return

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



(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Antone R & Pamela G Escobar
1514 Diamond Street
Springfield, OR 97477

Balance Due/Refund	Your Oregon state tax return (Form 40) shows you owe a balance due of \$474.00. You are paying by check.		
What You Need to Mail	Your tax return - The official return for mailing is included in this printout. Remember to sign and date the return. Your payment - Mail a check or money order for \$474.00, payable to "Oregon Department of Revenue". Write your Social Security number and "2015 Form 40" on the check. Mail the return and check together. ATTACHMENTS Attach Copy 1 of Form(s) W-2 to the front of your Form 40. Mail your return, attachments and payment to: Oregon Department of Revenue P.O. Box 14720 Salem, OR 97309-0463 Deadline: Postmarked by April 18, 2016 Don't forget correct postage on the envelope.		
What You Need to Keep	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select File tab, then select the Print for Your Records category.		
2015 Oregon Tax Return Summary	Taxable Income	\$	18,407.00
	Total Tax	\$	803.00
	Total Payments/Credits	\$	329.00
	Payment Due	\$	474.00
Special Formatting	Your printed state tax forms may have special formatting on them, such as bar codes or other symbols. This is to enable fast processing. Don't worry, these forms have been approved by your taxing authority and are acceptable for printing and mailing.		

File by Mail Instructions for your 2015 Oregon Tax Return

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



(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Antone R & Pamela G Escobar
1514 Diamond Street
Springfield, OR 97477

Changed Your Mind About e-filing?		You can still file electronically. Just go back to TurboTax, select the File tab, then select the E-file category. We'll walk you through the process. Once you file, we will let you know if your return is accepted (or rejected) by the state taxing agency.
--	--	---

**Oregon Income Tax
Payment Voucher and Instructions****Where to mail your payment:****Mail to:**

For payments made with an original or amended return, if you filed your return:	On paper	PO Box 14555 Salem OR 97309-0940
	With a 2-D barcode or electronically	PO Box 14720 Salem OR 97309-0463
For estimated payments and extension payments		PO Box 14950 Salem OR 97309-0950

Don't use Form 40-V if you are using an electronic payment option. Use the voucher only if you are paying by check or money order. Do not mail cash.

Complete the form. Select the appropriate payment type.

Tax year. Enter the month, day, and year for the beginning and end date of the tax year you are submitting the payment for. For most filers this will be January 1 through December 31 of the tax year. **Example:** For tax year 2015, enter: *Begins: 01/01/2015. Ends: 12/31/2015.*

Cut along the dotted line and mail to the Department of Revenue at the appropriate address from above.

Note: If you are viewing this form electronically, and you see a solid box instead of letters or numbers, adjust the view size to 100 percent. If the letters or numbers are still not visible, press the tab key.

Oregon Income Tax Payment Voucher**• Tax year:**

Begins: 01/01/2015
Ends: 12/31/2015

• Payment type (check only one):

- ☒ Original return.
☐ Extension payment.
☐ Estimated payment.
☐ Amended return.

Form
40-V

Department of Revenue use only

•

First name and initial	Last name	SSN
ANTONE R	ESCOBAR	035-24-6444
Spouse's first name and initial	Spouse's last name	SSN
PAMELA G	ESCOBAR	036-26-3957
Current mailing address		
1514 DIAMOND STREET		
City	State	ZIP code
SPRINGFIELD	OR	97477
		Contact phone
		541-505-7439

\$

Enter payment amount

474.00

1003000000035246444ESC0036263957201512310101555012

2015 Form 40
Oregon
Individual Income Tax Return
for Full-year Residents Only



00461501011555

Tax year ending: ● 12/31/2015

- ☐ Amended return. If amending for an NOL, tax year the NOL was generated: ●
- ☐ Calculated using "as if" federal return. ● ☐ Bankruptcy.
- ☐ Extension filed. ● ☐ Form 24.

For office use only

F

H

035-24-6444 ☐ P APPLIED FOR
036-26-3957 ☐ S APPLIED FOR
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET

DOB 03/18/1934

☐ DECEASED

DOB 01/29/1941

☐ DECEASED

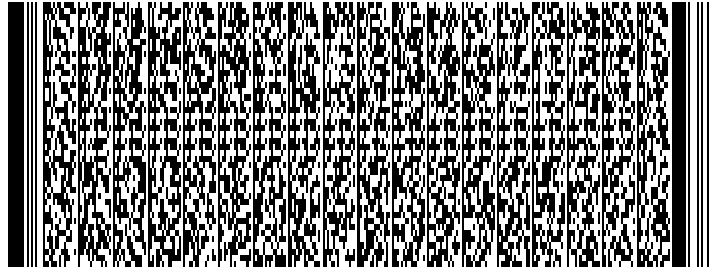
SPRINGFIELD OR 97477
USA
PHONE 541-505-7439

FILING STATUS: MARRIED JOINT
EXEMPTIONS:

6a SELF: ☒ REGULAR ☐ DISABLED
☐ CLAIMED AS DEPENDENT

6b SPOUSE: ☒ REGULAR ☐ DISABLED
☐ CLAIMED AS DEPENDENT

2
1
1



Dependents. List your dependents.

● First name	● Last name	● Dependent's relationship code	● Dependent's SSN	● Dependent's date of birth (mm/dd/yyyy)	● Check if child with qualifying disability
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

6c Total number of dependents ● 6c

6d Total number of dependent children with qualifying disability (see instructions) ● 6d

6e Total exemptions. Add 6a through 6d Total ● 6e

Don't forget!

Include a copy of your federal Form 1040, 1040A, 1040EZ, 1040NR, or 1040NR-EZ or we may adjust your return.

2015 Form 40

Name

ANTONE R & PAMELA G ESCOBAR

SSN

035-24-6444



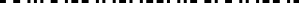
00461501021555

Note: Remember to **reprint page 1** if any changes are made on this page.

Taxable income	7	Federal adjusted gross income. Federal Form 1040, line 37; 1040A, line 21; 1040EZ, line 4; 1040NR, line 36; or 1040NR-EZ, line 10. See instructions	● 7	72,447	.00	
	8	Total additions from Schedule OR-ASC, section 1	● 8	605	.00	
	9	Income after additions. Add lines 7 and 8.....	● 9	73,052	.00	
Subtractions	10	2015 federal tax liability (\$0-\$6,450; see instructions for the correct amount)	● 10	4,879	.00	
	11	Social Security included on federal Form 1040, line 20b; or Form 1040A, line 14b	● 11	25,057	.00	
	12	Oregon income tax refund included in federal income	● 12	313	.00	
	13	Total subtractions from Schedule OR-ASC, section 2	● 13	2,800	.00	
	14	Total subtractions. Add lines 10 through 13.....	● 14	33,049	.00	
	15	Income after subtractions. Line 9 minus line 14	● 15	40,003	.00	
Deductions	16	Itemized deductions from federal Schedule A, line 29.....	● 16	21,909	.00	
	17	State income tax claimed as an itemized deduction	● 17	313	.00	
	18	Net Oregon itemized deductions. Line 16 minus line 17.....	● 18	21,596	.00	
	19	Standard deduction	● 19		.00	
	19a	You were: ● ☒ 65 or older; ● ☐ Blind. Your spouse was: ● ☒ 65 or older; ● ☐ Blind.				
	20	Enter the larger of line 18 or line 19	● 20	21,596	.00	
	21	Oregon taxable income. Line 15 minus line 20. If line 20 is more than line 15, enter -0-	● 21	18,407	.00	
Tax	22	Tax. See instructions. Enter tax on line 22. Check box if tax is calculated using:	● 22	1,191	.00	
		● 22a ☐ Form FIA-40; ● 22b ☐ Worksheet FCG; ● 22c ☐ Schedule OR-PTE.				
	23	Interest on certain installment sales.....	● 23		.00	
	24	Total tax before credits; add lines 22 and 23	● 24	1,191	.00	
Nonrefundable credits	25	Exemption credit. If the amount on line 7 is less than \$100,000, multiply your total exemptions on line 6e by \$194. Otherwise, see instructions.....	● 25	388	.00	
	26	Political contribution credit. See limits	● 26	0	.00	
	27	Total standard credits from Schedule OR-ASC, section 3.....	● 27		.00	
	28	Total carryforward credits from Schedule OR-ASC, section 4.....	● 28		.00	
	29	Total nonrefundable credits. Add lines 25 through 28.....	● 29	388	.00	
	30	Tax after nonrefundable credits. Line 24 minus line 29. If line 29 is more than line 24, enter -0- ..	● 30	803	.00	

Name

SSN



Note: Remember to **reprint page 1** if any changes are made on this page.

Amended Statement

Explanation of adjustments

If this is an amended return, complete this statement with an explanation of what you are amending. Indicate the return line numbers and the reason for each change. If your filing status has changed, explain why.



15601501011555

**Schedule
OR-ASC****Oregon Adjustments
for Form 40 Filers****2015**

First name and initial ANTONE R	Last name ESCOBAR	Social Security number (SSN) 035-24-6444
Spouse's first name and initial PAMELA G	Spouse's last name ESCOBAR	Spouse's SSN if joint return 036-26-3957

Use Schedule OR-ASC to claim any of the following that aren't included on Form 40:

- Additions.
- Subtractions.
- Standard credits.
- Carryforward credits.
- Refundable credits.

Identify the code you're claiming and enter the information requested in the corresponding section.

For more information, refer to the instructions beginning on page 2.

Section 1: Additions (codes 102–160).

Code	Amount
● 1a 158	● 1b 605
● 1c	● 1d
● 1e	● 1f
● 1g	● 1h
Enter total on Form 40, line 8 605	

Section 2: Subtractions (codes 300–358).

Code	Amount
● 2a 351	● 2b 2,800
● 2c	● 2d
● 2e	● 2f
● 2g	● 2h
Enter total on Form 40, line 13 2,800	

Section 3: Standard credits (codes 801–814).

Code	Amount	State abbreviation (if claiming code 802)
● 3a	● 3b	● 3c
● 3d	● 3e	● 3f
● 3g	● 3h	● 3i
● 3j	● 3k	● 3l
Enter total on Form 40, line 27		

Section 4: Carryforward credits (codes 835–865).

Code	Amount carried forward from the previous year	Amount awarded this year	Credit amount claimed this year
● 4a	● 4b	● 4c	● 4d
● 4e	● 4f	● 4g	● 4h
● 4i	● 4j	● 4k	● 4l
● 4m	● 4n	● 4o	● 4p
Enter total on Form 40, line 28			

Section 5: Refundable credits (codes 890–894).

Code	Amount
● 5a	● 5b
● 5c	● 5d
● 5e	● 5f
● 5g	● 5h
Enter total on Form 40, line 36	

— You must include this schedule with your Oregon income tax return —

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning , 2015, ending , 20		See separate instructions.
Your first name and initial Antone R	Last name Escobar	Your social security number 035-24-6444
If a joint return, spouse's first name and initial Pamela G	Last name Escobar	Spouse's social security number 036-26-3957
Home address (number and street). If you have a P.O. box, see instructions. 1514 Diamond Street		Apt. no. ▲ Make sure the SSN(s) above and on line 6c are correct.
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Springfield OR 97477		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
Foreign country name	Foreign province/state/county	Foreign postal code

Filing Status

1 ☐ Single	4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
2 ☒ Married filing jointly (even if only one had income)	5 ☐ Qualifying widow(er) with dependent child
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶	

Check only one box.

Exemptions

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a	Boxes checked on 6a and 6b 2
b ☒ Spouse	
c Dependents:	
(1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) ☒ if child under age 17 qualifying for child tax credit (see instructions)	No. of children on 6c who: • lived with you • did not live with you due to divorce or separation (see instructions)
If more than four dependents, see instructions and check here ▶ ☐	Dependents on 6c not entered above
d Total number of exemptions claimed	Add numbers on lines above ▶ 2

Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2	7	
8a Taxable interest. Attach Schedule B if required	8a	5,715.
b Tax-exempt interest. Do not include on line 8a	8b	1,505.
9a Ordinary dividends. Attach Schedule B if required	9a	7,993.
b Qualified dividends	9b	3,849.
10 Taxable refunds, credits, or offsets of state and local income taxes	10	313.
11 Alimony received	11	
12 Business income or (loss). Attach Schedule C or C-EZ	12	
13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐	13	-3,000.
14 Other gains or (losses). Attach Form 4797	14	
15a IRA distributions	15a	
b Taxable amount	15b	1,736.
16a Pensions and annuities	16a	11,585.
b Taxable amount	16b	10,523.
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	24,110.
18 Farm income or (loss). Attach Schedule F	18	
19 Unemployment compensation	19	
20a Social security benefits	20a	35,050.
b Taxable amount	20b	25,057.
21 Other income. List type and amount	21	
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	72,447.

Adjusted Gross Income

23 Educator expenses	23	
24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25 Health savings account deduction. Attach Form 8889	25	
26 Moving expenses. Attach Form 3903	26	
27 Deductible part of self-employment tax. Attach Schedule SE	27	
28 Self-employed SEP, SIMPLE, and qualified plans	28	
29 Self-employed health insurance deduction	29	
30 Penalty on early withdrawal of savings	30	
31a Alimony paid b Recipient's SSN ▶	31a	
32 IRA deduction	32	
33 Student loan interest deduction	33	
34 Tuition and fees. Attach Form 8917	34	
35 Domestic production activities deduction. Attach Form 8903	35	
36 Add lines 23 through 35	36	
37 Subtract line 36 from line 22. This is your adjusted gross income ▶	37	72,447.

REV 12/30/15 TTMac Form **1040** (2015)

File by Mail Instructions for your 2015 California Tax Return

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



(If you prefer, you can still e-file. Go to the end of these instructions for more information.)

Antone R & Pamela G Escobar
1514 Diamond Street
Springfield, OR 97477

Balance Due/Refund	Your California state tax return (Form 540NR) shows no balance due or refund amount.		
What You Need to Mail	Your tax return - The official return for mailing is included in this printout. Remember to sign and date the return. Attach the following to your California tax return: - a copy of your federal return - any Form(s) W-2, W-2G, 592-B, 593, and 1099s that have California withholding you may have received to the front of your return. Mail your return and attachments to: Franchise Tax Board PO Box 942840 Sacramento, CA 94240-0001 Deadline: Postmarked by April 18, 2016 Don't forget correct postage on the envelope.		
What You Need to Keep	Keep these instructions and a copy of your return for your records. If you did not print one before closing TurboTax, go back to the program and select File tab, then select the Print for Your Records category.		
2015 California Tax Return Summary	Taxable Income	\$	14,775.00
	Total Tax	\$	0.00
	No Refund or Amount Due	\$	0.00
	Effective Tax Rate		0.00%
Special Formatting	Your printed state tax forms may have special formatting on them, such as bar codes or other symbols. This is to enable fast processing. Don't worry, these forms have been approved by your taxing authority and are acceptable for printing and mailing.		
Changed Your Mind About e-filing?	You can still file electronically. Just go back to TurboTax, select the File tab, then select the E-file category. We'll walk you through the process. Once you file, we will let you know if your return is accepted (or rejected) by the state taxing agency.		

2015**California Nonresident or Part-Year
Resident Income Tax Return****Long Form****540NR**

APE

035-24-6444 ESCO 036-26-3957 15
 ANTONE R ESCOBAR
 PAMELA G ESCOBAR

A
R
RP

1514 DIAMOND STREET
 SPRINGFIELD OR 97477

03-18-1934 01-29-1941

- Filing Status**
- 1 ☐ Single
 2 ☒ Married/RDP filing jointly. See inst.
 3 ☐ Married/RDP filing separately. Enter spouse's/RDP's SSN or ITIN above and full name here _____
 4 ☐ Head of household (with qualifying person). See instructions.
 5 ☐ Qualifying widow(er) with dependent child. Enter year spouse/RDP died _____
 If your California filing status is different from your federal filing status, check the box here ☐

- 6 If someone can claim you (or your spouse/RDP) as a dependent, check the box here. See inst. ☐ 6 ☐

► For line 7, line 8, line 9, and line 10: Multiply the amount you enter in the box by the pre-printed dollar amount for that line. **Whole dollars only**

7 **Personal:** If you checked box 1, 3, or 4 above, enter 1 in the box. If you checked box 2 or 5, enter 2. If you checked the box on line 6, see instructions. ☒ 7 ☐ 2 X \$109 = ☒ \$ 218

8 **Blind:** If you (or your spouse/RDP) are visually impaired, enter 1; if both are visually impaired, enter 2 ☒ 8 ☐ X \$109 = ☒ \$

9 **Senior:** If you (or your spouse/RDP) are 65 or older, enter 1; if both are 65 or older, enter 2 ☒ 9 ☐ 2 X \$109 = ☒ \$ 218

10 **Dependents: Do not include yourself or your spouse/RDP.**

	Dependent 1	Dependent 2	Dependent 3
First Name	☒	☒	☒
Last Name	☒	☒	☒
SSN	☒	☒	☒
Dependent's relationship to you	☒	☒	☒

Total dependent exemptions ☒ 10 ☐ X \$337 = ☒ \$

11 **Exemption amount:** Add line 7 through line 10 ☒ 11 ☐ \$ 436

12 Total California wages from your Form(s) W-2, box 16 ☒ 12 00

13 Enter federal AGI from Form 1040, line 37; 1040A, line 21; 1040EZ, line 4; 1040NR, line 36; or 1040NR-EZ, line 10 ☒ 13 72447 00

14 California adjustments – subtractions. Enter the amount from Schedule CA (540NR), line 37, column B ☒ 14 26029 00

15 Subtract line 14 from line 13. If less than zero, enter the result in parentheses. See instructions ☒ 15 46418 00

16 California adjustments – additions. Enter the amount from Schedule CA (540NR), line 37, column C ☒ 16 11534 00

17 Adjusted gross income from all sources. Combine line 15 and line 16 ☒ 17 57952 00

18 Enter the **larger** of: Your California **itemized deductions** from Schedule CA (540NR), line 44; **OR** Your California **standard deduction**. See instructions ☒ 18 21438 00

19 Subtract line 18 from line 17. This is your **total taxable income**. If less than zero, enter -0- ☒ 19 36514 00

Total Taxable Income

Your name: ESCOBAR Your SSN or ITIN: 035-24-6444

CA Taxable Income	31	Tax. Check the box if from: ☒ Tax Table ☐ Tax Rate Schedule • ☐ FTB 3800 • ☐ FTB 3803	31	573	00
	32	CA adjusted gross income from Schedule CA (540NR), Part IV, line 45	32	23451	00
	35	CA Taxable Income from Schedule CA (540NR), Part IV, line 49	35	14775	00
	36	CA Tax Rate. Divide line 31 by line 19	36	0.0157	
	37	CA Tax Before Exemption Credits. Multiply line 35 by line 36	37	232	00
	38	CA Exemption Credit Percentage. Divide line 35 by line 19. If more than 1, enter 1.0000	38	0.4046	
	39	CA Prorated Exemption Credits. Multiply line 11 by line 38. If the amount on line 13 is more than \$178,706, see instructions	39	176	00
	40	CA Regular Tax Before Credits. Subtract line 39 from line 37. If less than zero, enter -0-	40	56	00
	41	Tax. See instructions. Check the box if from: • ☐ Schedule G-1 • ☐ FTB 5870A	41		00
	42	Add line 40 and line 41	42	56	00
Special Credits	50	Nonrefundable Child and Dependent Care Expenses Credit. See instructions. Attach form FTB 3506	50		00
	51	Credit for joint custody head of household. See instructions	51		00
	52	Credit for dependent parent. See instructions	52		00
	53	Credit for senior head of household. See instructions	53		00
	54	Credit percentage. Divide line 35 by line 19. If more than 1, enter 1.0000. See instructions	54		
	55	Credit amount. See instructions	55		00
	58	Enter credit name <u>OTHER STATE</u> code <u>187</u> and amount	58	56	00
	59	Enter credit name _____ code _____ and amount	59		00
	60	To claim more than two credits. See instructions	60		00
	61	Nonrefundable renter's credit. See instructions	61		00
62	Add line 50 and line 55 through 61. These are your total credits	62	56	00	
63	Subtract line 62 from line 42. If less than zero, enter -0-	63	0	00	
Other Taxes	71	Alternative minimum tax. Attach Schedule P (540NR)	71		00
	72	Mental Health Services Tax. See instructions	72		00
	73	Other taxes and credit recapture. See instructions	73		00
	74	Add line 63, line 71, line 72, and line 73. This is your total tax	74	0	00
Payments	81	California income tax withheld. See instructions	81		00
	82	2015 CA estimated tax and other payments. See instructions	82		00
	83	Withholding (Form 592-B and/or 593). See instructions	83		00
	84	Excess SDI (or VPD) withheld. See instructions	84		00
	85	Earned Income Tax Credit (EITC)	85		00
	86	Add lines 81 through 85. These are your total payments. See instructions	86		00
Overpaid Tax/Tax Due	101	Overpaid tax. If line 86 is more than line 74, subtract line 74 from line 86	101		00
	102	Amount of line 101 you want applied to your 2016 estimated tax	102		00
	103	Overpaid tax available this year. Subtract line 102 from line 101	103		00
	104	Tax due. If line 86 is less than line 74, subtract line 86 from line 74	104		00

Your name: **ESCOBAR**Your SSN or ITIN: **035-24-6444**

	Code	Amount		Code	Amount	
Contributions	California Seniors Special Fund See inst.	● 400	00	Child Victims of Human Trafficking Fund	● 419	00
	Alzheimer's Disease/Related Disorders Fund	● 401	00	School Supplies for Homeless Children Fund	● 422	00
	Rare and Endangered Species			State Parks Protection Fund/Parks Pass Purchase	● 423	00
	Preservation Program	● 403	00	Protect Our Coast and Oceans Fund	● 424	00
	California Breast Cancer Research Fund	● 405	00	Keep Arts in Schools Fund	● 425	00
	California Firefighters' Memorial Fund	● 406	00	California Senior Legislature Fund	● 427	00
	Emergency Food for Families Fund	● 407	00	Habitat for Humanity Fund	● 428	00
	California Peace Officer Memorial			California Sexual Violence Victim Services Fund	● 429	00
	Foundation Fund	● 408	00	State Children's Trust Fund for the Prevention		
	California Sea Otter Fund	● 410	00	of Child Abuse	● 430	00
California Cancer Research Fund	● 413	00	Prevention of Animal Homelessness & Cruelty Fund.	● 431	00	
120 Add code 400 through code 431. This is your total contribution			● 120	00		

121 AMOUNT YOU OWE. Add line 104 and line 120. See instructions. **Do not send cash.**
Mail to: **FRANCHISE TAX BOARD, PO BOX 942867, SACRAMENTO CA 94267-0001** ● 121 00
Pay Online – Go to **ftb.ca.gov** for more information.

122 Interest, late return penalties, and late payment penalties. **122** 00
123 Underpayment of estimated tax. Check the box: ● ☐ **FTB 5805 attached** ● ☐ **FTB 5805F attached** . ● **123** 00
124 Total amount due. See instructions. Enclose, but **do not** staple, any payment **124** 00

125 REFUND OR NO AMOUNT DUE. Subtract line 120 from line 103.
Mail to: **FRANCHISE TAX BOARD, PO BOX 942840, SACRAMENTO CA 94240-0001** ● 125 0.00

Fill in the information to authorize direct deposit of your refund into one or two accounts. **Do not** attach a voided check or a deposit slip.
See instructions. **Have you verified the routing and account numbers?** Use whole dollars only.

All or the following amount of my refund (line 125) is authorized for direct deposit into the account shown below:

☐ Checking				
☐ Savings				 00
● Routing number	● Type	● Account number	● 126 Direct deposit amount	

The remaining amount of my refund (line 125) is authorized for direct deposit into the account shown below:

☐ Checking				
☐ Savings				 00
● Routing number	● Type	● Account number	● 127 Direct deposit amount	

IMPORTANT: Attach a copy of your complete federal return.

To learn about your privacy rights, how we may use your information, and the consequences for not providing the requested information, go to **ftb.ca.gov** and search for **privacy notice**. To request this notice by mail, call 800.852.5711.

Under penalties of perjury, I declare that I have examined this tax return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Your signature _____ Date _____ Spouse's/RDP's signature (if a joint tax return, both must sign) _____

X _____ X _____
Your email address (optional). Enter only one email address. _____ Daytime phone number (optional) _____

Sign Here

It is unlawful to forge a spouse's/RDP's signature.

Joint tax return? (See instructions)

541 5057439
Paid preparer's signature (**declaration of preparer is based on all information of which preparer has any knowledge**) _____

Firm's name (or yours, if self-employed)	● PTIN
SELF PREPARED	
Firm's address	● FEIN

Do you want to allow another person to discuss this tax return with us? See instructions. ● ☐ Yes ☒ No
Print Third Party Designee's Name _____ Telephone Number _____

California Adjustments — 2015 Nonresidents or Part-Year Residents

CA (540NR)

Important: Attach this schedule behind Long Form 540NR, Side 3 as a supporting California schedule.

Name(s) as shown on tax return

SSN or ITIN

A N T O N E R & P A M E L A G E S C O B A R

0 3 5 2 4 6 4 4 4

Part I Residency Information. Complete all lines that apply to you and your spouse/RDP for taxable year 2015.

During 2015:

1 My California (CA) Residency (Check one)

- a Myself: ☒ X Nonresident ☐ Part-Year Resident ☐ Resident
 b Spouse: ☒ X Nonresident ☐ Part-Year Resident ☐ Resident

Yourself

Spouse/RDP

- 2 a I was domiciled in (enter two letter code, see instructions) ☐ OR ☐ OR
 b I was in the military and stationed in (enter two letter code) ☐ ☐
 3 I became a CA resident (enter state of prior residence and date (mm/dd/yy) of move) ☐ ☐
 4 I became a CA nonresident (enter new state of residence and date (mm/dd/yy) of move) ☐ ☐
 5 I was a CA nonresident the entire year (enter state of residence) ☐ OR ☐ OR
 6 The number of days I spent in CA for any purpose was: ☐ 0 ☐ 0
 7 I owned a home/property in CA (enter Y for Yes, N for No) ☐ Y ☐ Y
 8 Before 2015: I was a CA resident for the period of ☐ 05/01/74 - 12/24/07 ☐ 05/01/74 - 08/15/07

Part II Income Adjustment Schedule

Section A — Income

	A	B	C	D	E
	Federal Amounts (taxable amounts from your federal tax return)	Subtractions See instructions (difference between CA & federal law)	Additions See instructions (difference between CA & federal law)	Total Amounts Using CA Law As If You Were a CA Resident (subtract col. B from col. A; add col. C to the result)	CA Amounts (income earned or received as a CA resident and income earned or received from CA sources as a nonresident)
7 Wages, salaries, tips, etc. See instructions before making an entry in col. B or C. 7	☐	☐	☐	☐	☐
8 Taxable interest. (b) <u>1,505.</u> . . . 8(a)	☐ 5,715.	☐	☐ 1,505.	☐ 7,220.	☐ 0.
9 Ordinary dividends. See instructions. (b) <u>3,849.</u> 9(a)	☐ 7,993.	☐	☐	☐ 7,993.	☐ 0.
10 Taxable refunds, credits, or offsets of state and local income taxes. 10	☐ 313.	☐ 313.			
11 Alimony received. See instructions. 11	☐	☐	☐	☐	☐
12 Business income or (loss). 12	☐	☐	☐	☐	☐
13 Capital gain or (loss). See instructions. . . . 13	☐ -3,000.	☐	☐ 10,029.	☐ 7,029.	☐ 0.
14 Other gains or (losses) 14	☐	☐	☐	☐	☐
15 IRA distributions. See instructions. (a) <u>1,736.</u> 15(b)	☐ 1,736.	☐	☐	☐ 1,736.	☐ 0.
16 Pensions and annuities. See instructions. (a) <u>11,585.</u> . . . 16(b)	☐ 10,523.	☐	☐	☐ 10,523.	☐ 0.
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. 17	☐ 24,110.	☐ 659.	☐	☐ 23,451.	☐ 23,451.
18 Farm income or (loss) 18	☐	☐	☐	☐	☐
19 Unemployment compensation 19	☐	☐			
20 Social security benefits. (a) <u>35,050.</u> 20(b)	☐ 25,057.	☐ 25,057.			
21 Other income. a California lottery winnings b Disaster loss deduction from FTB 3805V c Federal NOL (Form 1040, line 21) d NOL deduction from FTB 3805V 21 e NOL from FTB 3805D, FTB 3805Z, FTB 3806, FTB 3807, or FTB 3809 f Other (describe):	☐	☐	☐	☐	☐
22 a Total: Combine line 7 through line 21 in each column. Continue to Side 2. . . . 22a	☐ 72,447.	☐ 26,029.	☐ 11,534.	☐ 57,952.	☐ 23,451.

Income Adjustment Schedule		A	B	C	D	E
Section B — Adjustments to Income		Federal Amounts (taxable amounts from your federal tax return)	Subtractions See instructions (difference between CA & federal law)	Additions See instructions (difference between CA & federal law)	Total Amounts Using CA Law As If You Were a CA Resident (subtract col. B from col. A; add col. C to the result)	CA Amounts (income earned or received as a CA resident and income earned or received from CA sources as a nonresident)
22	b Enter totals from Side 1, line 22a, col. A through col. E 22b	72,447.	26,029.	11,534.	57,952.	23,451.
23	Educator expenses 23					
24	Certain business expenses of reservists, performing artists, and fee-basis government officials 24					
25	Health savings account deduction 25					
26	Moving expenses 26					
27	Deductible part of self-employment tax . . . 27					
28	Self-employed SEP, SIMPLE, and qualified plans 28					
29	Self-employed health insurance deduction . 29					
30	Penalty on early withdrawal of savings . . . 30					
31a	Alimony paid. b Enter recipient's: SSN - - - - - Last name 31a					
32	IRA deduction 32					
33	Student loan interest deduction 33					
34	Tuition and fees 34					
35	Domestic production activities deduction . . 35					
36	Add line 23 through line 35 in each column, A through E 36					
37	Total. Subtract line 36 from line 22b in each column, A through E. See instructions. . 37	72,447.	26,029.	11,534.	57,952.	23,451.

Part III Adjustments to Federal Itemized Deductions

38 **Federal Itemized Deductions.** Enter the amount from federal Schedule A (Form 1040), lines 4, 9, 15, 19, 20, 27, and 28
(or Schedule A (Form 1040NR), lines 1, 5, 6, 13, and 14) 38 21,909.

39 Enter total of federal Schedule A (Form 1040), line 5 (State Disability Insurance, and state and local income tax,
or General Sales Tax), and line 8 (foreign taxes **only**) (or Schedule A (Form 1040NR), line 1). See instructions. 39 471.

40 Subtract line 39 from line 38 40 21,438.

41 Other adjustments including California lottery losses. See instructions. Specify 41

42 Combine line 40 and line 41 42 21,438.

43 **Is your federal AGI (Long Form 540NR, line 13) more than the amount shown below for your filing status?**
Single or married/RDP filing separately \$178,706
Head of household \$268,063
Married/RDP filing jointly or qualifying widow(er) \$357,417

No. Transfer the amount on line 42 to line 43.

Yes. Complete the Itemized Deductions Worksheet in the instructions for Schedule CA (540NR), line 43 43 21,438.

44 Enter the larger of the amount on line 43 or your standard deduction. See instructions 44 21,438.

Part IV California Taxable Income

45 **California AGI.** Enter your California AGI from line 37, column E 45 23,451.

46 Enter your deductions from line 44 46 21,438.

47 **Deduction Percentage.** Divide line 37, column E by line 37, column D. Carry the decimal
to four places. If the result is greater than 1.0000, enter 1.0000. If less than zero, enter -0- 47 0.4047

48 **California Itemized/Standard Deductions.** Multiply line 46 by the percentage on line 47 48 8,676.

49 **California Taxable Income.** Subtract line 48 from line 45. Transfer this amount to Long Form 540NR, line 35. If less than
zero, enter -0- 49 14,775.

2015**California Capital Gain or Loss Adjustment**

Do not complete this schedule if all of your California gains (losses) are the same as your federal gains (losses).

D (540)

Name(s) as shown on return

SSN or ITIN

A N T O N E R & P A M E L A G E S C O B A R

0 3 5 2 4 6 4 4 4

	(a) Description of property Identify S corporation stock Example: 100 shares of "Z" (S stock)	(b) Sales price	(c) Cost or other basis	(d) Loss If (c) is more than (b), subtract (b) from (c)	(e) Gain If (b) is more than (c), subtract (c) from (b)
1					
a	AMERN HIGH INCOME TRUST CL A	82.04	95.46	13.42	
b	FRNKLN FLTG RATE DLY ACCESS A	905.46	976.48	71.02	
c	FRANKLIN MUT QUEST FD CL A	738.58	850.55	111.97	
d	TEMPLETON GLBL BALANCED CL A	912.93	1,030.78	117.85	
e	TEMPLETON GLOBAL BOND FUND A	364.53	394.82	30.29	
f	BRIDGE BUILDER CORE BOND	300.	302.17	2.17	
g	BRIDGE BUILDER CORE BOND	300.	303.59	3.59	
h	BRIDGE BUILDER SMALLMID VALUE	300.	297.35		2.65
i	CAPITAL WORLD GRW & INCOME F1	134.44	94.94		39.50
j	COLUMBIA MID CAP VALUE	984.63	853.56		131.07
k	DEUTSCHE SMALL CAP VALUE INSTL	230.17	237.46	7.29	
l	JP MORGAN CORE BOND	187.68	183.87		3.81
m	OPPENHEIMER RISING DIVIDEND	550.81	474.43		76.38
n	T. ROWE PRICE NEW INCOME	149.33	150.09	0.76	
o	AMERICAN BALANCED FUND CL A	225.	125.71		99.29
p	AMERICAN BALANCED FUND CL A	225.	122.91		102.09
q	AMERICAN BALANCED FUND CL A	225.	123.84		101.16
r	AMERICAN BALANCED FUND CL A	225.	123.78		101.22
s	AMERICAN BALANCED FUND CL A	225.	122.51		102.49
t	AMERICAN BALANCED FUND CL A	225.	123.74		101.26
u	AMERICAN BALANCED FUND CL A	225.	123.19		101.81
v	SEE LINE 1A STATEMENT	125,464.13	125,718.37	7,753.33	7,499.09

2	Net gain or (loss) shown on California Schedule(s) K-1 (100S, 541, 565, and 568).....	2		
3	Capital gain distributions (federal Form 1099-DIV, box 2a)	3		6,679.
4	Total 2015 gains from all sources. Add column (e) amounts of line 1, line 2, and line 3	4		15,141.
5	2015 loss. Add column (d) amounts of line 1 and line 2.	5	(8,112.)	
6	California capital loss carryover from 2014, if any. See instructions.....	6	(0.)	
7	Total 2015 loss. Add line 5 and line 6.	7	(8,112.)	



- 8 Combine line 4 and line 7. If a loss, go to line 9. If a gain, go to line 10. ☒ 8 7,029.
- 9 If line 8 is a loss, enter the smaller of: (a) the loss on line 8.
(b) \$3,000 (\$1,500 if married/RDP filing separate). See instructions ☒ 9 ()
- 10 Enter the gain or (loss) from federal Form 1040, line 13 ☒ 10 -3,000.
- 11 Enter the California gain from line 8 or (loss) from line 9. ☒ 11 7,029.
- 12 a If line 10 is **more** than line 11, enter the difference here and on Schedule CA (540), line 13, column B. ☒ 12a
- b If line 10 is **less** than line 11, enter the difference here and on Schedule CA (540), line 13, column C. ☒ 12b 10,029.

Additional information from your Schedule D (540): California Capital Gain or Loss Adjustment**Schedule D (540): California Capital Gain or Loss Adjustment
Gain/Loss Adjustment****Continuation Statement**

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
AMERICAN BALANCED FUND CL A	225.	124.90		100.10
AMERICAN BALANCED FUND CL A	225.	129.94		95.06
AMERICAN BALANCED FUND CL A	225.	125.56		99.44
AMERICAN BALANCED FUND CL A	225.	123.29		101.71
AMERICAN BALANCED FUND CL A	225.	126.06		98.94
FRANKLIN EQUITY INCOME FUND A	150.	81.06		68.94
FRANKLIN EQUITY INCOME FUND A	150.	78.47		71.53
FRANKLIN EQUITY INCOME FUND A	150.	79.48		70.52
FRANKLIN EQUITY INCOME FUND A	150.	79.66		70.34
FRANKLIN EQUITY INCOME FUND A	150.	78.26		71.74
FRANKLIN EQUITY INCOME FUND A	150.	79.34		70.66
FRANKLIN EQUITY INCOME FUND A	150.	79.52		70.48
FRANKLIN EQUITY INCOME FUND A	150.	81.13		68.87
FRANKLIN EQUITY INCOME FUND A	150.	84.88		65.12
FRANKLIN EQUITY INCOME FUND A	150.	81.60		68.40
FRANKLIN EQUITY INCOME FUND A	150.	80.53		69.47
FRANKLIN EQUITY INCOME FUND A	150.	86.04		63.96
FRANKLIN GWTH ALLOC FD CL A	225.	127.91		97.09
FRANKLIN GWTH ALLOC FD CL A	225.	123.35		101.65
FRANKLIN GWTH ALLOC FD CL A	225.	122.64		102.36
FRANKLIN GWTH ALLOC FD CL A	225.	121.75		103.25
FRANKLIN GWTH ALLOC FD CL A	225.	120.32		104.68
FRANKLIN GWTH ALLOC FD CL A	225.	121.56		103.44
FRANKLIN GWTH ALLOC FD CL A	225.	125.65		99.35
FRANKLIN GWTH ALLOC FD CL A	225.	128.46		96.54
FRANKLIN GWTH ALLOC FD CL A	225.	134.11		90.89
FRANKLIN GWTH ALLOC FD CL A	225.	131.85		93.15
FRANKLIN GWTH ALLOC FD CL A	225.	130.90		94.10
FRANKLIN GWTH ALLOC FD CL A	225.	135.11		89.89
AMERICAN INTL GRW & INC A	170.	122.27		47.73
AMERICAN INTL GRW & INC A	170.	117.70		52.30
AMERICAN INTL GRW & INC A	170.	120.30		49.70
AMERICAN INTL GRW & INC A	170.	116.88		53.12
AMERICAN INTL GRW & INC A	170.	114.92		55.08
AMERICAN INTL GRW & INC A	170.	118.02		51.98
AMERICAN INTL GRW & INC A	170.	118.75		51.25

Schedule D (540): California Capital Gain or Loss Adjustment
Gain/Loss Adjustment

Continuation Statement

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
AMERICAN INTL GRW & INC A	170.	125.14		44.86
AMERICAN INTL GRW & INC A	170.	133.37		36.63
AMERICAN INTL GRW & INC A	170.	129.31		40.69
AMERICAN INTL GRW & INC A	170.	131.64		38.36
AMERICAN INTL GRW & INC A	169.93	137.77		32.16
AMERICAN INTL GRW & INC A	0.07	0.05		0.02
FRANKLIN MUT QUEST FD CL A	150.	150.		0.
FRANKLIN MUT QUEST FD CL A	150.	145.18		4.82
FRANKLIN MUT QUEST FD CL A	150.	144.65		5.35
FRANKLIN MUT QUEST FD CL A	150.	142.48		7.52
FRANKLIN MUT QUEST FD CL A	150.	142.65		7.35
FRANKLIN MUT QUEST FD CL A	150.	144.65		5.35
FRANKLIN MUT QUEST FD CL A	150.	146.25		3.75
FRANKLIN MUT QUEST FD CL A	150.	150.		0.
FRANKLIN MUT QUEST FD CL A	150.	152.50	2.50	
FRANKLIN MUT QUEST FD CL A	150.	157.71	7.71	
FRANKLIN MUT QUEST FD CL A	150.	150.		0.
FRANKLIN MUT QUEST FD CL A	150.	150.		0.
TEMPLETON GLOBAL BOND FUND A	132.	124.12		7.88
TEMPLETON GLOBAL BOND FUND A	132.	125.32		6.68
TEMPLETON GLOBAL BOND FUND A	132.	125.72		6.28
TEMPLETON GLOBAL BOND FUND A	132.	124.01		7.99
TEMPLETON GLOBAL BOND FUND A	132.	124.12		7.88
TEMPLETON GLOBAL BOND FUND A	132.	126.13		5.87
TEMPLETON GLOBAL BOND FUND A	132.	125.83		6.17
TEMPLETON GLOBAL BOND FUND A	132.	131.94		0.06
TEMPLETON GLOBAL BOND FUND A	132.	132.51	0.51	
TEMPLETON GLOBAL BOND FUND A	132.	132.47	0.47	
TEMPLETON GLOBAL BOND FUND A	132.	129.41		2.59
TEMPLETON GLOBAL BOND FUND A	132.	133.06	1.06	
AMERN HIGH INCOME TRUST CL A	71.38	83.05	11.67	
AMERN HIGH INCOME TRUST CL A	1,224.85	1,485.54	260.69	
FRNKLN FLTG RATE DLY ACCESS A	641.53	691.87	50.34	
FRNKLN FLTG RATE DLY ACCESS A	18,648.99	20,735.21	2,086.22	
FRANKLIN MUT QUEST FD CL A	8,622.07	9,929.13	1,307.06	
FRANKLIN MUT QUEST FD CL A	14,390.45	15,878.91	1,488.46	
TEMPLETON GLBL BALANCED CL A	13,256.99	14,968.41	1,711.42	
TEMPLETON GLOBAL BOND FUND A	1,726.18	1,869.59	143.41	
TEMPLETON GLOBAL BOND FUND A	15,903.49	16,060.13	156.64	

Schedule D (540): California Capital Gain or Loss Adjustment
Gain/Loss Adjustment

Continuation Statement

Property Description	Sales Price	Cost or Other Basis	Loss	Gain
DODGE & COX INTL STOCK	300.	251.53		48.47
DODGE & COX INTL STOCK	300.	233.91		66.09
HARBOR CAPITAL APPRECIATION	300.	215.46		84.54
HARBOR CAPITAL APPRECIATION	300.	203.90		96.10
T ROWE PRICE INSTL LRGE CP GR	300.	212.95		87.05
INVESTMENT CO OF AMER CL F1	300.	257.37		42.63
MFS RESEARCH INTERNATIONAL	300.	261.98		38.02
MAINSTAY HIGH YIELD CORP BD	300.	314.08	14.08	
OPPENHEIMER INTL GROWTH	300.	258.88		41.12
CAPITAL WORLD GRW & INCOME F1	5,952.84	4,203.81		1,749.03
COLUMBIA MID CAP VALUE	2,893.84	2,508.67		385.17
COLUMBIA MID CAP VALUE	2,169.03	1,722.87		446.16
DEUTSCHE SMALL CAP VALUE INSTL	1,032.18	1,064.87	32.69	
DEUTSCHE SMALL CAP VALUE INSTL	1,275.17	1,738.97	463.80	
DODGE & COX INCOME	3,454.24	3,316.89		137.35
JP MORGAN CORE BOND	1,331.04	1,304.		27.04
JP MORGAN CORE BOND	5,647.01	5,427.48		219.53
OPPENHEIMER RISING DIVIDEND	5,539.41	4,771.26		768.15
T. ROWE PRICE NEW INCOME	4,632.61	4,511.06		121.55
T. ROWE PRICE NEW INCOME	1,667.66	1,676.21	8.55	
T. ROWE PRICE NEW INCOME	1,634.17	1,640.22	6.05	
Total	125,464.13	125,718.37	7,753.33	7,499.09

2015 Other State Tax Credit**S**

Attach to Form 540, Long Form 540NR, or Form 541.

Name(s) as shown on your California tax return	SSN, ITIN, or FEIN
A N T O N E R & P A M E L A G E S C O B A R	0 3 5 2 4 6 4 4 4

Part I Double-Taxed Income (Read specific line instructions for Part I before completing.)

(a) Income item(s) description	(b) Double-taxed income taxable by California	(c) Double-taxed income taxable by other state
☒ RENT/P ' SHIP/SCORP/TRUSTS	☒ 23,451.	☒ 24,110.
☐	☐	☐
☐	☐	☐
1 Total double-taxed income	☒ 23,451.	☒ 24,110.

Part II Figure Your Other State Tax Credit (Read specific line instructions for Part II before completing.)

2 California tax liability. See instructions	☒ 2	56.	00
3 Double-taxed income taxable by California. Enter the amount from Part I, line 1, column (b).	☒ 3	23,451.	00
4 California adjusted gross income. See instructions	☒ 4	23,451.	00
5 Divide line 3 by line 4. Do not enter more than 1.0000	☒ 5	1.0000	
6 Multiply line 2 by line 5	☒ 6	56.	00
7 Income tax liability paid to name of other state (use state's abbreviation) ☒ OR See instructions	☒ 7	803.	00
8 Double-taxed income taxable by other state. Enter the amount from Part I, line 1, column (c).	☒ 8	24,110	00
9 Adjusted gross income taxable by other state. See instructions	☒ 9	40,003.	00
10 Divide line 8 by line 9. Do not enter more than 1.0000	☒ 10	0.6027	
11 Multiply line 7 by line 10	☒ 11	484.	00
12 Other state tax credit. Enter the smaller of line 6 or line 11. Use Credit Code 187 . See instructions	☒ 12	56.	00

2015**Depreciation and
Amortization Adjustments****3885A**

Do not complete this form if your California depreciation amounts are the same as federal amounts.

Name(s) as shown on tax return

A N T O N E , R & P A M E L A G E S C O B A R

SSN or ITIN

0 3 5 2 4 6 4 4 4

Part I Identify the Activity as Passive or Nonpassive. (See instructions.)

Business or activity to which form FTB 3885A relates

1 ☒ This form is being completed for a passive activity.☐ This form is being completed for a nonpassive activity.

5 2 7 5 L Y N R I D G E D R I V E

Part II Election to Expense Certain Tangible Property (IRC Section 179).2 Enter the amount from line 12 of the Tangible Property Expense Worksheet in the instructions ☒ 2**Part III Depreciation**

	(a) Description of property placed in service	(b) Date placed in service mm/dd/yyyy	(c) California basis for depreciation	(d) Method	(e) Life or rate	(f) California depreciation deduction
3						

4 Add the amounts on line 3, column (f) 4

5 California depreciation for assets placed in service prior to 2015 5 2,597.

6 Total California depreciation from this activity. Add the amounts on line 2, line 4, and line 5. 6 2,597.

7 Total federal depreciation from this activity. Enter depreciation from federal Form 4562, line 22. 7 1,938.

8 a If line 6 is **more** than line 7, enter the difference here and see instructions 8a 659.b If line 6 is **less** than line 7, enter the difference here and see instructions 8b**Part IV Amortization**

	(a) Description of cost	(b) Date amortization begins mm/dd/yyyy	(c) California basis for amortization	(d) Code section	(e) Period or percentage	(f) California amortization deduction
9						

10 Total California amortization from this activity. Add the amounts on line 9, column (f) 10

11 California amortization of costs that began before 2015. 11

12 Total California amortization from this activity. Add the amounts on line 10 and line 11 12

13 Total federal amortization from this activity. Enter amortization from federal Form 4562, line 44 13

14 a If line 12 is **more** than line 13, enter the difference here and see instructions 14ab If line 12 is **less** than line 13, enter the difference here and see instructions 14b**Instructions for Form FTB 3885A****Depreciation and Amortization Adjustments**References in these instructions are to the Internal Revenue Code (IRC) as of **January 1, 2015**, and to the California Revenue and Taxation Code (R&TC).**General Information**

In general, for taxable years beginning on or after January 1, 2015, California law conforms to the Internal Revenue Code (IRC) as of January 1, 2015. However, there are continuing differences between California and federal law. When California conforms to federal tax law changes, we do not always adopt all of the changes made at the federal level. For more information, go to ftb.ca.gov and search for **conformity**. Additional information can be found in FTB Pub. 1001, Supplemental Guidelines to California Adjustments, the instructions for California Schedule CA (540 or 540NR), and the Business Entity tax booklets.

The instructions provided with California tax forms are a summary of California tax law and are only intended to aid taxpayers in preparing their state income tax returns. We include information that is most useful to the greatest number of taxpayers in the limited space available. It is not possible to include all requirements of the California Revenue and Taxation Code (R&TC) in the tax booklets. Taxpayers should not consider the tax booklets as authoritative law.

Purpose

Use form FTB 3885A, Depreciation and Amortization Adjustments, **only** if there is a difference between the amount of depreciation and amortization allowed as a deduction using California law and the amount allowed using federal law. California law and federal law have not always allowed the same depreciation methods, special credits, or accelerated write-offs. As a result, the recovery periods or the basis on which the depreciation is figured for California may be different from the amounts used for federal purposes. You will probably have reportable differences if all or part of your assets were placed in service:

- **Before January 1, 1987.** California disallowed depreciation under the federal accelerated cost recovery system (ACRS). Continue to figure California depreciation for those assets in the same manner as in prior years for those assets.
- **On or after January 1, 1987.** California provides special credits and accelerated write-offs that affect the California basis of qualifying assets. California did not conform to all changes to federal law enacted in 1993; therefore, the California basis or recovery periods may be different for some assets.
- **On or after September 11, 2001.** If you claimed the 30% additional depreciation for federal purposes, California has not conformed to the

2015

Social Security Number

035-24-6444

Line 18 – Farm Income or (Loss) Adjustments	(B) California	(C) Federal	(d) California Adjustment
Totals			

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning

, 2015, ending

, 20

See separate instructions.

Your first name and initial

Antone R

Last name

Escobar

Your social security number

035–24–6444

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

Pamela G

Last name

Escobar

Spouse's social security number

036–26–3957

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

1514 Diamond Street

Apt. no.

▲ Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).

Springfield OR 97477

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

5 ☐ Qualifying widow(er) with dependent child

Check only one box.

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) ☒ if child under age 17 qualifying for child tax credit (see instructions)

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

d Total number of exemptions claimed

Boxes checked on 6a and 6b

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

Add numbers on lines above ▶

2

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

8b 1,505.

9a Ordinary dividends. Attach Schedule B if required

b Qualified dividends

9b 3,849.

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

15a 15a

b Taxable amount

15b 1,736.

16a Pensions and annuities

16a 16a

b Taxable amount

16b 10,523.

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

20a 20a

b Taxable amount

20b 25,057.

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 ▶

22 72,447.

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a W-2, see instructions.

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 ▶

31a

32 IRA deduction

32

33 Student loan interest deduction

33

34 Tuition and fees. Attach Form 8917

34

35 Domestic production activities deduction. Attach Form 8903

35

36 Add lines 23 through 35

36

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

37 72,447.

REV 12/30/15 TTMac Form **1040** (2015)

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Itemized Deductions

► Information about Schedule A and its separate instructions is at www.irs.gov/schedulea.
► Attach to Form 1040.

OMB No. 1545-0074

2015
Attachment
Sequence No. **07**

Name(s) shown on Form 1040

Antone R & Pamela G Escobar

Your social security number

035-24-6444

Medical and Dental Expenses		Caution: Do not include expenses reimbursed or paid by others.			
1	Medical and dental expenses (see instructions)	1	12,312.		
2	Enter amount from Form 1040, line 38 2 72,447.				
3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1951, multiply line 2 by 7.5% (.075) instead	3	5,434.		
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	6,878.		
Taxes You Paid		State and local (check only one box):			
a	☒ Income taxes, or	5	313.		
b	☐ General sales taxes	6	3,607.		
6	Real estate taxes (see instructions)	7			
7	Personal property taxes	8	158.		
8	Other taxes. List type and amount ► Foreign Taxes Int Div	9	4,078.		
9	Add lines 5 through 8				
Interest You Paid		10	9,508.		
10	Home mortgage interest and points reported to you on Form 1098	11			
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 ►	12			
12	Points not reported to you on Form 1098. See instructions for special rules	13			
13	Mortgage insurance premiums (see instructions)	14			
14	Investment interest. Attach Form 4952 if required. (See instructions.)	15	9,508.		
15	Add lines 10 through 14				
Gifts to Charity		16	1,445.		
16	Gifts by cash or check. If you made any gift of \$250 or more, see instructions.	17			
17	Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	18			
18	Carryover from prior year	19	1,445.		
19	Add lines 16 through 18				
Casualty and Theft Losses		20			
20	Casualty or theft loss(es). Attach Form 4684. (See instructions.)				
Job Expenses and Certain Miscellaneous Deductions		21			
21	Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►	22			
22	Tax preparation fees	23			
23	Other expenses—investment, safe deposit box, etc. List type and amount ►	24			
24	Add lines 21 through 23	25			
25	Enter amount from Form 1040, line 38 25	26			
26	Multiply line 25 by 2% (.02)	27			
27	Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-				
Other Miscellaneous Deductions		28			
28	Other—from list in instructions. List type and amount ►				
Total Itemized Deductions		29	21,909.		
29	Is Form 1040, line 38, over \$154,950? X 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. ☐ Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.				
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)

Interest and Ordinary Dividends

► Attach to Form 1040A or 1040.

► Information about Schedule B and its instructions is at www.irs.gov/scheduleb.

OMB No. 1545-0074

2015
Attachment
Sequence No. **08**

Name(s) shown on return

Antone R & Pamela G Escobar

Your social security number

035-24-6444

Part I
Interest

(See instructions on back and the instructions for Form 1040A, or 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 instructions on back and list this interest first. Also, show that buyer's social security number and address ►

EDWARD JONES

Selco Credit Union

Brandt Financial Services

Amount

2,985.76

30.27

2,699.

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 1040A, or Form 1040, line 8a ►

5,715.03

3

5,715.03

4

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

Amount

Part II
Ordinary Dividends

(See instructions on back and the instructions for Form 1040A, or 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 ► EDWARD JONES
EDWARD JONES

5,949.28

2,043.60

5

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

7,992.88

6

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

Part III
Foreign Accounts and Trusts

(See instructions on back.)

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 2015, 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

Yes	No
	X

If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements

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

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- 8** During 2015, 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 on back

	X
--	---

**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

2015
Attachment
Sequence No. **12**

Name(s) shown on return

Antone R & Pamela G Escobar

Your social security number

035-24-6444

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	6,141.	6,247.	1.	-105.
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 the back				7 -105.

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	44,235.	44,276.		-41.
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	82,804.	82,340.	32.	496.
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 the instructions				13 6,679.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 (37,438.)
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on the back				15 -30,304.

Part III Summary

16	Combine lines 7 and 15 and enter the result	16	-30,409.
	• 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? ☐ Yes. Go to line 18. ☐ 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? ☐ 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. ☐ 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: • The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500) } 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? ☒ 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). ☐ No. Complete the rest of Form 1040 or Form 1040NR.		

Sales and Other Dispositions of Capital Assets

► Information about Form 8949 and its separate instructions is at www.irs.gov/form8949.
► File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Name(s) shown on return

Social security number or taxpayer identification number

Antone R & Pamela G Escobar

035-24-6444

Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part I Short-Term. Transactions involving capital assets you held 1 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 totals directly on Schedule D, line 1a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	82.04	95.46			-13.42
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	905.46	976.48			-71.02
	FRANKLIN MUT QUEST FD CL A	12/18/15	12/29/15	738.58	850.55			-111.97
	TEMPLETON GLBL BALANCED CL A	Various	12/29/15	912.93	1,030.78			-117.85
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	364.53	394.82			-30.29
	BRIDGE BUILDER CORE BOND	02/04/15	08/21/15	300.	302.84	W	0.67	-2.17
	BRIDGE BUILDER CORE BOND	02/04/15	09/23/15	300.	304.04	W	0.45	-3.59
	BRIDGE BUILDER SMALLMID VALUE	05/20/15	06/23/15	300.	297.35			2.65
	CAPITAL WORLD GRW & INCOME F1	Various	07/13/15	134.44	94.94			39.50
	COLUMBIA MID CAP VALUE	Various	05/20/15	984.63	853.56			131.07
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	230.17	237.46			-7.29
	JP MORGAN CORE BOND	Various	02/04/15	187.68	183.87			3.81
	OPPENHEIMER RISING DIVIDEND	Various	05/20/15	550.81	474.43			76.38
	T. ROWE PRICE NEW INCOME	Various	07/13/15	149.33	150.09			-0.76
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 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ►				6,140.60	6,246.67		1.12	-104.95

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	71.38	83.05			-11.67
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	641.53	691.87			-50.34
	FRANKLIN MUT QUEST FD CL A	Various	12/29/15	8,622.07	9,929.13			-1,307.06
	TEMPLETON GLBL BALANCED CL A	Various	12/29/15	13,256.99	14,968.41			-1,711.42
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	1,726.18	1,869.59			-143.41
	HARBOR CAPITAL APPRECIATION	01/18/13	03/23/15	300.	215.46			84.54
	HARBOR CAPITAL APPRECIATION	01/18/13	07/23/15	300.	203.90			96.10
	T ROWE PRICE INSTL LRGE CP GR	06/06/13	11/23/15	300.	212.95			87.05
	MAINSTAY HIGH YIELD CORP BD	05/24/12	10/23/15	300.	314.08			-14.08
	OPPENHEIMER INTL GROWTH	01/29/13	02/23/15	300.	258.88			41.12
	CAPITAL WORLD GRW & INCOME F1	Various	07/13/15	5,952.84	4,203.81			1,749.03
	COLUMBIA MID CAP VALUE	Various	05/20/15	2,893.84	2,508.67			385.17
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	1,032.18	1,064.87			-32.69
	JP MORGAN CORE BOND	Various	02/04/15	1,331.04	1,304.			27.04
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) ▶				37,028.05	37,828.67			-800.62

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	OPPENHEIMER RISING DIVIDEND	Various	05/20/15	5,539.41	4,771.26			768.15
	T. ROWE PRICE NEW INCOME	Various	07/13/15	1,667.66	1,676.21			-8.55
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) ►				7,207.07	6,447.47			759.60

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERICAN BALANCED FUND CL A	Various	01/16/15	225.	125.71			99.29
	AMERICAN BALANCED FUND CL A	Various	02/19/15	225.	122.91			102.09
	AMERICAN BALANCED FUND CL A	Various	03/19/15	225.	123.84			101.16
	AMERICAN BALANCED FUND CL A	Various	04/17/15	225.	123.78			101.22
	AMERICAN BALANCED FUND CL A	Various	05/19/15	225.	122.51			102.49
	AMERICAN BALANCED FUND CL A	Various	06/19/15	225.	123.74			101.26
	AMERICAN BALANCED FUND CL A	Various	07/17/15	225.	123.19			101.81
	AMERICAN BALANCED FUND CL A	Various	08/19/15	225.	124.90			100.10
	AMERICAN BALANCED FUND CL A	Various	09/18/15	225.	129.94			95.06
	AMERICAN BALANCED FUND CL A	Various	10/19/15	225.	125.56			99.44
	AMERICAN BALANCED FUND CL A	Various	11/19/15	225.	123.29			101.71
	AMERICAN BALANCED FUND CL A	Various	12/18/15	225.	126.06			98.94
	FRANKLIN EQUITY INCOME FUND A	Various	01/16/15	150.	81.06			68.94
	FRANKLIN EQUITY INCOME FUND A	Various	02/19/15	150.	78.47			71.53
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) ▶				3,000.	1,654.96			1,345.04

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN EQUITY INCOME FUND A	Various	03/19/15	150.	79.48			70.52
	FRANKLIN EQUITY INCOME FUND A	Various	04/17/15	150.	79.66			70.34
	FRANKLIN EQUITY INCOME FUND A	Various	05/19/15	150.	78.26			71.74
	FRANKLIN EQUITY INCOME FUND A	Various	06/19/15	150.	79.34			70.66
	FRANKLIN EQUITY INCOME FUND A	Various	07/17/15	150.	79.52			70.48
	FRANKLIN EQUITY INCOME FUND A	Various	08/19/15	150.	81.13			68.87
	FRANKLIN EQUITY INCOME FUND A	Various	09/18/15	150.	84.88			65.12
	FRANKLIN EQUITY INCOME FUND A	Various	10/19/15	150.	81.60			68.40
	FRANKLIN EQUITY INCOME FUND A	Various	11/19/15	150.	80.53			69.47
	FRANKLIN EQUITY INCOME FUND A	Various	12/18/15	150.	86.04			63.96
	FRANKLIN GWTH ALLOC FD CL A	Various	01/16/15	225.	127.91			97.09
	FRANKLIN GWTH ALLOC FD CL A	Various	02/19/15	225.	123.35			101.65
	FRANKLIN GWTH ALLOC FD CL A	Various	03/19/15	225.	122.64			102.36
	FRANKLIN GWTH ALLOC FD CL A	Various	04/17/15	225.	121.75			103.25
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) ►				2,400.	1,306.09			1,093.91

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN GWTH ALLOC FD CL A	Various	05/19/15	225.	120.32			104.68
	FRANKLIN GWTH ALLOC FD CL A	Various	06/19/15	225.	121.56			103.44
	FRANKLIN GWTH ALLOC FD CL A	Various	07/17/15	225.	125.65			99.35
	FRANKLIN GWTH ALLOC FD CL A	Various	08/19/15	225.	128.46			96.54
	FRANKLIN GWTH ALLOC FD CL A	Various	09/18/15	225.	134.11			90.89
	FRANKLIN GWTH ALLOC FD CL A	Various	10/19/15	225.	131.85			93.15
	FRANKLIN GWTH ALLOC FD CL A	Various	11/19/15	225.	130.90			94.10
	FRANKLIN GWTH ALLOC FD CL A	Various	12/18/15	225.	135.11			89.89
	AMERICAN INTL GRW & INC A	Various	01/16/15	170.	122.27			47.73
	AMERICAN INTL GRW & INC A	Various	02/19/15	170.	117.70			52.30
	AMERICAN INTL GRW & INC A	Various	03/19/15	170.	120.30			49.70
	AMERICAN INTL GRW & INC A	Various	04/17/15	170.	116.88			53.12
	AMERICAN INTL GRW & INC A	Various	05/19/15	170.	114.92			55.08
	AMERICAN INTL GRW & INC A	Various	06/19/15	170.	118.02			51.98
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) ▶				2,820.	1,738.05			1,081.95

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

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Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	AMERICAN INTL GRW & INC A	Various	07/17/15	170.	118.75			51.25
	AMERICAN INTL GRW & INC A	Various	08/19/15	170.	125.14			44.86
	AMERICAN INTL GRW & INC A	Various	09/18/15	170.	133.37			36.63
	AMERICAN INTL GRW & INC A	Various	10/19/15	170.	129.31			40.69
	AMERICAN INTL GRW & INC A	Various	11/19/15	170.	131.64			38.36
	AMERICAN INTL GRW & INC A	Various	12/18/15	169.93	137.77			32.16
	AMERICAN INTL GRW & INC A	Various	12/18/15	0.07	0.05			0.02
	FRANKLIN MUT QUEST FD CL A	Various	01/16/15	150.	150.71	W	0.71	0.
	FRANKLIN MUT QUEST FD CL A	Various	02/19/15	150.	145.18			4.82
	FRANKLIN MUT QUEST FD CL A	Various	03/19/15	150.	144.65			5.35
	FRANKLIN MUT QUEST FD CL A	Various	04/17/15	150.	142.48			7.52
	FRANKLIN MUT QUEST FD CL A	Various	05/19/15	150.	142.65			7.35
	FRANKLIN MUT QUEST FD CL A	Various	06/19/15	150.	144.65			5.35
	FRANKLIN MUT QUEST FD CL A	Various	07/17/15	150.	146.25			3.75
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) ▶				2,070.	1,792.60		0.71	278.11

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	FRANKLIN MUT QUEST FD CL A	Various	08/19/15	150.	150.33	W	0.33	0.
	FRANKLIN MUT QUEST FD CL A	Various	09/18/15	150.	157.19	W	4.69	-2.50
	FRANKLIN MUT QUEST FD CL A	Various	10/19/15	150.	157.71			-7.71
	FRANKLIN MUT QUEST FD CL A	Various	11/19/15	150.	155.65	W	5.65	0.
	FRANKLIN MUT QUEST FD CL A	Various	12/18/15	150.	168.45	W	18.45	0.
	TEMPLETON GLOBAL BOND FUND A	Various	01/16/15	132.	124.12			7.88
	TEMPLETON GLOBAL BOND FUND A	Various	02/19/15	132.	125.32			6.68
	TEMPLETON GLOBAL BOND FUND A	Various	03/19/15	132.	125.72			6.28
	TEMPLETON GLOBAL BOND FUND A	Various	04/17/15	132.	124.01			7.99
	TEMPLETON GLOBAL BOND FUND A	Various	05/19/15	132.	124.12			7.88
	TEMPLETON GLOBAL BOND FUND A	Various	06/19/15	132.	126.13			5.87
	TEMPLETON GLOBAL BOND FUND A	Various	07/17/15	132.	125.83			6.17
	TEMPLETON GLOBAL BOND FUND A	Various	08/19/15	132.	131.94			0.06
	TEMPLETON GLOBAL BOND FUND A	Various	09/18/15	132.	133.76	W	1.25	-0.51
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) ▶				1,938.	1,930.28		30.37	38.09

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.

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Social security number or taxpayer identification number

Antone R & Pamela G Escobar**035-24-6444**

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Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	TEMPLETON GLOBAL BOND FUND A	Various	10/19/15	132.	132.73	W	0.26	-0.47
	TEMPLETON GLOBAL BOND FUND A	Various	11/19/15	132.	129.41			2.59
	TEMPLETON GLOBAL BOND FUND A	Various	12/18/15	132.	133.64	W	0.58	-1.06
	AMERN HIGH INCOME TRUST CL A	Various	12/29/15	1,224.85	1,485.54			-260.69
	FRNKLN FLTG RATE DLY ACCESS A	Various	12/29/15	18,648.99	20,735.21			-2,086.22
	FRANKLIN MUT QUEST FD CL A	Various	12/29/15	14,390.45	15,878.91			-1,488.46
	TEMPLETON GLOBAL BOND FUND A	Various	12/29/15	15,903.49	16,060.13			-156.64
	DODGE & COX INTL STOCK	03/02/11	01/23/15	300.	251.53			48.47
	DODGE & COX INTL STOCK	03/02/11	05/22/15	300.	233.91			66.09
	INVESTMENT CO OF AMER CL F1	03/02/11	12/23/15	300.	257.37			42.63
	MFS RESEARCH INTERNATIONAL	03/02/11	04/23/15	300.	261.98			38.02
	COLUMBIA MID CAP VALUE	Various	05/20/15	2,169.03	1,722.87			446.16
	DEUTSCHE SMALL CAP VALUE INSTL	Various	05/20/15	1,275.17	1,738.97			-463.80
	DODGE & COX INCOME	03/02/11	02/04/15	3,454.24	3,316.89			137.35
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) ▶				58,662.22	62,339.09		0.84	-3,676.03

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.

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 number

Antone R & Pamela G Escobar**035-24-6444**

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part II Long-Term. Transactions involving capital assets you held more than 1 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 totals directly on Schedule D, line 8a; you aren't 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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	JP MORGAN CORE BOND	Various	02/04/15	5,647.01	5,427.48			219.53
	T. ROWE PRICE NEW INCOME	03/02/11	02/04/15	4,632.61	4,511.06			121.55
	T. ROWE PRICE NEW INCOME	Various	07/13/15	1,634.17	1,640.22			-6.05
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) ▶				11,913.79	11,578.76			335.03

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.

**SCHEDULE E
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)

Name(s) shown on return

Supplemental Income and Loss

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041.

▶ Information about Schedule E and its separate instructions is at www.irs.gov/schedulee.

OMB No. 1545-0074

2015Attachment
Sequence No. **13**

Antone R & Pamela G Escobar

Your social security number

035-24-6444

Part I Income or Loss From Rental Real Estate and Royalties Note: If you are in the business of renting personal property, use **Schedule C or C-EZ** (see instructions). If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.**A** Did you make any payments in 2015 that would require you to file Form(s) 1099? (see instructions) ☐ Yes ☒ No**B** If "Yes," did you or will you file required Forms 1099? ☐ Yes ☐ No

1a	Physical address of each property (street, city, state, ZIP code)				
A	5275 Lynridge Drive Yorba Linda CA 92886				
B					
C					
1b	Type of Property (from list below)	2 For each rental real estate property listed above, report the number of fair rental and personal use days. Check the QJV box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
A	1		A 365	B 0	☐
B			B		☐
C			C		☐

Type of Property:

- | | | | |
|---------------------------|------------------------------|-------------|--------------------|
| 1 Single Family Residence | 3 Vacation/Short-Term Rental | 5 Land | 7 Self-Rental |
| 2 Multi-Family Residence | 4 Commercial | 6 Royalties | 8 Other (describe) |

Income:	Properties:	A	B	C
3 Rents received	3	30,000.		
4 Royalties received	4			
Expenses:				
5 Advertising	5			
6 Auto and travel (see instructions)	6			
7 Cleaning and maintenance	7			
8 Commissions.	8			
9 Insurance	9	626.		
10 Legal and other professional fees	10			
11 Management fees	11			
12 Mortgage interest paid to banks, etc. (see instructions)	12			
13 Other interest.	13			
14 Repairs.	14	1,187.		
15 Supplies	15			
16 Taxes	16	2,112.		
17 Utilities.	17	27.		
18 Depreciation expense or depletion	18	1,938.		
19 Other (list) ▶	19			
20 Total expenses. Add lines 5 through 19	20	5,890.		
21 Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file Form 6198	21	24,110.		
22 Deductible rental real estate loss after limitation, if any, on Form 8582 (see instructions)	22	() () ()		
23a Total of all amounts reported on line 3 for all rental properties	23a	30,000.		
b Total of all amounts reported on line 4 for all royalty properties	23b			
c Total of all amounts reported on line 12 for all properties	23c			
d Total of all amounts reported on line 18 for all properties	23d	1,938.		
e Total of all amounts reported on line 20 for all properties	23e	5,890.		
24 Income. Add positive amounts shown on line 21. Do not include any losses	24		24,110.	
25 Losses. Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here	25	()		
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26		24,110.	

For Paperwork Reduction Act Notice, see the separate instructions.

BAA REV 01/28/16 TTMac

Schedule E (Form 1040) 2015

2015 Form 40
Oregon
Individual Income Tax Return
for Full-year Residents Only



00461501011555

Tax year ending: 12/31/2015

- ☐ Amended return. If amending for an NOL, tax year the NOL was generated:
- ☐ Calculated using "as if" federal return. ☐ Bankruptcy.
- ☐ Extension filed. ☐ Form 24.

For office use only

F

H

035-24-6444 ☐ P APPLIED FOR
036-26-3957 ☐ S APPLIED FOR
ANTONE R ESCOBAR
PAMELA G ESCOBAR
1514 DIAMOND STREET

DOB 03/18/1934

☐ DECEASED

DOB 01/29/1941

☐ DECEASED

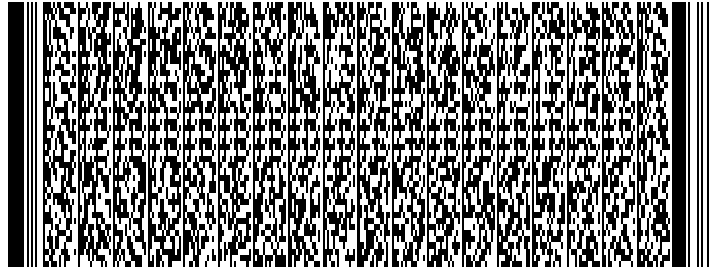
SPRINGFIELD OR 97477
USA
PHONE 541-505-7439

FILING STATUS: MARRIED JOINT
EXEMPTIONS:

6a SELF: ☒ REGULAR ☐ DISABLED
☐ CLAIMED AS DEPENDENT

6b SPOUSE: ☒ REGULAR ☐ DISABLED
☐ CLAIMED AS DEPENDENT

2
1
1



Dependents. List your dependents.

First name	Last name	Dependent's relationship code	Dependent's SSN	Dependent's date of birth (mm/dd/yyyy)	Check if child with qualifying disability
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

6c Total number of dependents 6c

6d Total number of dependent children with qualifying disability (see instructions) 6d

6e Total exemptions. Add 6a through 6d Total 6e

Don't forget!

Include a copy of your federal Form 1040, 1040A, 1040EZ, 1040NR, or 1040NR-EZ or we may adjust your return.

2015 Form 40

Name

ANTONE R & PAMELA G ESCOBAR

SSN

035-24-6444



00461501021555

Note: Remember to **reprint page 1** if any changes are made on this page.

Taxable income	7	Federal adjusted gross income. Federal Form 1040, line 37; 1040A, line 21; 1040EZ, line 4; 1040NR, line 36; or 1040NR-EZ, line 10. See instructions	● 7	72,447	.00	
	8	Total additions from Schedule OR-ASC, section 1	● 8	605	.00	
	9	Income after additions. Add lines 7 and 8.....	● 9	73,052	.00	
Subtractions	10	2015 federal tax liability (\$0-\$6,450; see instructions for the correct amount)	● 10	4,879	.00	
	11	Social Security included on federal Form 1040, line 20b; or Form 1040A, line 14b	● 11	25,057	.00	
	12	Oregon income tax refund included in federal income	● 12	313	.00	
	13	Total subtractions from Schedule OR-ASC, section 2	● 13	2,800	.00	
	14	Total subtractions. Add lines 10 through 13.....	● 14	33,049	.00	
	15	Income after subtractions. Line 9 minus line 14	● 15	40,003	.00	
Deductions	16	Itemized deductions from federal Schedule A, line 29.....	● 16	21,909	.00	
	17	State income tax claimed as an itemized deduction	● 17	313	.00	
	18	Net Oregon itemized deductions. Line 16 minus line 17.....	● 18	21,596	.00	
	19	Standard deduction	● 19		.00	
	19a	You were: ● ☒ 65 or older; ● ☐ Blind. Your spouse was: ● ☒ 65 or older; ● ☐ Blind.				
	20	Enter the larger of line 18 or line 19	● 20	21,596	.00	
	21	Oregon taxable income. Line 15 minus line 20. If line 20 is more than line 15, enter -0-	● 21	18,407	.00	
Tax	22	Tax. See instructions. Enter tax on line 22. Check box if tax is calculated using:	● 22	1,191	.00	
		● 22a ☐ Form FIA-40; ● 22b ☐ Worksheet FCG; ● 22c ☐ Schedule OR-PTE.				
	23	Interest on certain installment sales.....	● 23		.00	
	24	Total tax before credits; add lines 22 and 23	● 24	1,191	.00	
Nonrefundable credits	25	Exemption credit. If the amount on line 7 is less than \$100,000, multiply your total exemptions on line 6e by \$194. Otherwise, see instructions.....	● 25	388	.00	
	26	Political contribution credit. See limits	● 26	0	.00	
	27	Total standard credits from Schedule OR-ASC, section 3.....	● 27		.00	
	28	Total carryforward credits from Schedule OR-ASC, section 4.....	● 28		.00	
	29	Total nonrefundable credits. Add lines 25 through 28.....	● 29	388	.00	
	30	Tax after nonrefundable credits. Line 24 minus line 29. If line 29 is more than line 24, enter -0- ..	● 30	803	.00	



15601501011555

**Schedule
OR-ASC****Oregon Adjustments
for Form 40 Filers****2015**

First name and initial ANTONE R	Last name ESCOBAR	Social Security number (SSN) 035-24-6444
Spouse's first name and initial PAMELA G	Spouse's last name ESCOBAR	Spouse's SSN if joint return 036-26-3957

Use Schedule OR-ASC to claim any of the following that aren't included on Form 40:

- Additions.
- Subtractions.
- Standard credits.
- Carryforward credits.
- Refundable credits.

Identify the code you're claiming and enter the information requested in the corresponding section.

For more information, refer to the instructions beginning on page 2.

Section 1: Additions (codes 102–160).

Code	Amount
● 1a 158	● 1b 605
● 1c	● 1d
● 1e	● 1f
● 1g	● 1h
Enter total on Form 40, line 8 605	

Section 2: Subtractions (codes 300–358).

Code	Amount
● 2a 351	● 2b 2,800
● 2c	● 2d
● 2e	● 2f
● 2g	● 2h
Enter total on Form 40, line 13 2,800	

Section 3: Standard credits (codes 801–814).

Code	Amount	State abbreviation (if claiming code 802)
● 3a	● 3b	● 3c
● 3d	● 3e	● 3f
● 3g	● 3h	● 3i
● 3j	● 3k	● 3l
Enter total on Form 40, line 27		

Section 4: Carryforward credits (codes 835–865).

Code	Amount carried forward from the previous year	Amount awarded this year	Credit amount claimed this year
● 4a	● 4b	● 4c	● 4d
● 4e	● 4f	● 4g	● 4h
● 4i	● 4j	● 4k	● 4l
● 4m	● 4n	● 4o	● 4p
Enter total on Form 40, line 28			

Section 5: Refundable credits (codes 890–894).

Code	Amount
● 5a	● 5b
● 5c	● 5d
● 5e	● 5f
● 5g	● 5h
Enter total on Form 40, line 36	

— You must include this schedule with your Oregon income tax return —