

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

, 2013, ending

, 20

See separate instructions.

Your first name and initial

BRADLEY S.

Last name

SCHNEIDER

Your social security number

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

Last name

Spouse's social security number

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

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.

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.

Foreign country name

Foreign province/state/county

Foreign postal code

☐ You ☐ Spouse

Filing Status

1 ☐ Single2 ☐ Married filing jointly (even if only one had income)3 ☒ Married filing separately. Enter spouse's SSN above and full name here. **JULIE R DANN**4 ☐ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here. **_____**5 ☐ Qualifying widow(er) with dependent child

Exemptions

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

DANIEL H SCHNEIDER

SON

Boxes checked on 6a and 6b **1**
No. of children on 6c who:
● lived with you **1**
● 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

Add numbers on lines above **2**

d Total number of exemptions claimed

Income

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

7 **127,666.**

8a Taxable interest. Attach Schedule B if required

8a **23.**

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

8b **8,047.**

9a Ordinary dividends. Attach Schedule B if required

9a **3,100.**

b Qualified dividends

9b **1,152.**

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

10 **_____**

11 Alimony received

11 **_____**

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

12 **69,784.**13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐13 **23,156.**

14 Other gains or (losses). Attach Form 4797

14 **_____**

15a IRA distributions

15a **_____**

b Taxable amount

15b **_____**

16a Pensions and annuities

16a **_____**

b Taxable amount

16b **_____**

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

17 **-3,513.**

18 Farm income or (loss). Attach Schedule F

18 **_____**

19 Unemployment compensation

19 **_____**

20a Social security benefits

20a **_____**

b Taxable amount

20b **_____**

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 **220,216.**

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 **220,216.**

Tax and Credits

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

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

38	Amount from line 37 (adjusted gross income)	38	220,216.
39a	Check <input type="checkbox"/> You were born before January 2, 1949, <input type="checkbox"/> Blind. if: <input type="checkbox"/> Spouse was born before January 2, 1949, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a		
b	If your spouse itemizes on a separate return or you were a dual-status alien, check here <input checked="" type="checkbox"/> 39b		
40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	55,221.
41	Subtract line 40 from line 38	41	164,995.
42	Exemptions. If line 38 is \$150,000 or less, multiply \$3,900 by the number on line 6d. Otherwise, see inst.	42	0.
43	Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-	43	164,995.
44	Tax. Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/>	44	38,745.
45	Alternative minimum tax. Attach Form 6251	45	6,713.
46	Add lines 44 and 45	46	45,458.
47	Foreign tax credit. Attach Form 1116 if required	47	
48	Credit for child and dependent care expenses. Attach Form 2441	48	
49	Education credits from Form 8863, line 19	49	
50	Retirement savings contributions credit. Attach Form 8880	50	
51	Child tax credit. Attach Schedule 8812, if required	51	
52	Residential energy credits. Attach Form 5695	52	
53	Other credits from Form: a <input checked="" type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53	
54	Add lines 47 through 53. These are your total credits	54	
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	45,458.

Other Taxes

56	Self-employment tax. Attach Schedule SE	56	
57	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	57	
58	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	58	
59a	Household employment taxes from Schedule H	59a	14,162.
b	First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
60	Taxes from: a <input checked="" type="checkbox"/> Form 8959 b <input checked="" type="checkbox"/> Form 8960 c <input type="checkbox"/> Inst.; enter code(s)	60	1,058.
61	Add lines 55 through 60. This is your total tax	61	60,678.

Payments

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	19,869.
63	2013 estimated tax payments and amount applied from 2012 return	63	14,300.
64a	Earned income credit (EIC)	64a	
b	Nontaxable combat pay election	64b	
65	Additional child tax credit. Attach Schedule 8812	65	
66	American opportunity credit from Form 8863, line 8	66	
67	Reserved	67	
68	Amount paid with request for extension to file	68	40,000.
69	Excess social security and tier 1 RRTA tax withheld	69	
70	Credit for federal tax on fuels. Attach Form 4136	70	
71	Credits from Form: a <input type="checkbox"/> 2439 b <input type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>	71	
72	Add lines 62, 63, 64a, and 65 through 71. These are your total payments	72	74,169.

Refund

Direct deposit? See instructions.

73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	13,491.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a	
b	Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings d Account number <input type="text"/>		
75	Amount of line 73 you want applied to your 2014 estimated tax	75	13,491.

Amount You Owe

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

Third Party Designee

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

Designee's name **TERI NEWMAN** Phone no. **(312) 207-1040** Personal identification number (PIN) **13579**

Sign Here

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

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

Your signature	Date	Your occupation	Daytime phone number
TERI NEWMAN		REPRESENTATIVE	
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here

PaidPreparer **TERI NEWMAN**

Preparer's signature

TERI NEWMAN

Date

08/12/14Check ☐ if

self-employed

PTIN

Use OnlyFirm's name **PLANTE & MORAN, PLLC**Firm's EIN **38 1357951****10 S. RIVERSIDE PLAZA, 9TH FLOOR**Phone no. **(312) 207-1040**Firm's address **CHICAGO, IL 60606**

Underpayment of Estimated Tax by Individuals, Estates, and Trusts

OMB No. 1545-0140

2013
Attachment
Sequence No. **06**

► Information about Form 2210 and its separate instructions is at www.irs.gov/form2210.

► Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

Name(s) shown on tax return

Identifying number

BRADLEY S. SCHNEIDER

Do You Have To File Form 2210?

Complete lines 1 through 7 below. Is line 7 less than \$1,000?	Yes	Do not file Form 2210. You do not owe a penalty.
No		
Complete lines 8 and 9 below. Is line 6 equal to or more than line 9?	Yes	You do not owe a penalty. Do not file Form 2210 (but if box E in Part II applies, you must file page 1 of Form 2210).
No		
You may owe a penalty. Does any box in Part II below apply?	Yes	You must file Form 2210. Does box B , C , or D in Part II apply?
No		
	No	You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but file only page 1 of Form 2210 .
	Yes	You must figure your penalty.
<p>Do not file Form 2210. You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return, but do not file Form 2210.</p>		

Part I Required Annual Payment

1	Enter your 2013 tax after credits from Form 1040, line 55 (see instructions if not filing Form 1040)	1	45,458.
2	Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	15,220.
3	Refundable credits (see instructions)	3	()
4	Current year tax. Combine lines 1, 2, and 3. If less than \$1,000, stop ; you do not owe a penalty. Do not file Form 2210	4	60,678.
5	Multiply line 4 by 90% (.90)	5	54,610.
6	Withholding taxes. Do not include estimated tax payments (see instructions)	6	19,869.
7	Subtract line 6 from line 4. If less than \$1,000, stop ; you do not owe a penalty. Do not file Form 2210	7	40,809.
8	Maximum required annual payment based on prior year's tax (see instructions)	8	14,773.
9	Required annual payment. Enter the smaller of line 5 or line 8	9	14,773.

Next: Is line 9 more than line 6?

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

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

- A** ☐ You request a **waiver** (see instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you are not required to figure your penalty.
- B** ☐ You request a **waiver** (see instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C** ☐ Your income varied during the year and your penalty is reduced or eliminated when figured using the **annualized income installment method**. You must figure the penalty using Schedule AI and file Form 2210.
- D** ☐ Your penalty is lower when figured by treating the federal income tax withheld from your income as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E** ☒ You filed or are filing a joint return for either 2012 or 2013, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you are **not** required to figure your penalty (unless box **B**, **C**, or **D** applies).

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **2210** (2013)

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

Section A - Figure Your Underpayment		Payment Due Dates			
		(a) 4/15/13	(b) 6/15/13	(c) 9/15/13	(d) 1/15/14
18 Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 25. Otherwise, enter 25% (.25) of line 9, Form 2210, in each column	18	3,693.	3,693.	3,693.	3,694.
19 Estimated tax paid and tax withheld. For column (a) only, also enter the amount from line 19 on line 23. If line 19 is equal to or more than line 18 for all payment periods, stop here; you do not owe a penalty. Do not file Form 2210 unless you checked a box in Part II	19	9,398.	9,967.	4,967.	9,837.
<i>Complete lines 20 through 26 of one column before going to line 20 of the next column.</i>					
20 Enter the amount, if any, from line 26 in the previous column	20		5,705.	11,979.	13,253.
21 Add lines 19 and 20	21		15,672.	16,946.	23,090.
22 Add the amounts on lines 24 and 25 in the previous column	22				
23 Subtract line 22 from line 21. If zero or less, enter -0-. For column (a) only, enter the amount from line 19	23	9,398.	15,672.	16,946.	23,090.
24 If line 23 is zero, subtract line 21 from line 22. Otherwise, enter -0-	24		0.	0.	
25 Underpayment. If line 18 is equal to or more than line 23, subtract line 23 from line 18. Then go to line 20 of the next column. Otherwise, go to line 26	25				
26 Overpayment. If line 23 is more than line 18, subtract line 18 from line 23. Then go to line 20 of the next column	26	5,705.	11,979.	13,253.	
Section B - Figure the Penalty (Use the Worksheet for Form 2210, Part IV, Section B - Figure the Penalty in the instructions.)					
27 Penalty. Enter the total penalty from line 14 of the Worksheet for Form 2210, Part IV, Section B - Figure the Penalty. Also include this amount on Form 1040, line 77; Form 1040A, line 46; Form 1040NR, line 74; Form 1040NR-EZ, line 26; or Form 1041, line 26. Do not file Form 2210 unless you checked a box in Part II	27				0.

Form **2210** (2013)

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on Form 1040

Itemized Deductions

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

OMB No. 1545-0074

2013

Attachment
Sequence No. **07**

Your social security number

BRADLEY S. SCHNEIDER

Medical and Dental Expenses	Caution. Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see instructions)	1	
2	Enter amount from Form 1040, line 38	2	
3	Multiply line 2 by 10% (.10). But if either you or your spouse was born before January 2, 1949, multiply line 2 by 7.5% (.075) instead	3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	
Taxes You Paid	5 State and local (check only one box):	5	15,422.
	a <input checked="" type="checkbox"/> Income taxes, or		
	b <input type="checkbox"/> General sales taxes		
6	Real estate taxes (see instructions)	6	12,150.
7	Personal property taxes	7	
8	Other taxes. List type and amount ►	8	
9	Add lines 5 through 8	9	27,572.
Interest You Paid	10 Home mortgage interest and points reported to you on Form 1098	10	1,714.
	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see instructions and show that person's name, identifying no., and address ►	11	
Note. Your mortgage interest deduction may be limited (see instructions).	12 Points not reported to you on Form 1098. See instructions for special rules	12	
	13 Mortgage insurance premiums (see instructions)	13	
	14 Investment interest. Attach Form 4952 if required. (See instructions.)	14	
	15 Add lines 10 through 14	15	1,714.
Gifts to Charity	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	16	28,035. STMT 8
	17 Other than by cash or check. If any gift of \$250 or more, see instructions. You must attach Form 8283 if over \$500	17	
	18 Carryover from prior year	18	
	19 Add lines 16 through 18	19	28,035.
Casualty and Theft Losses	20 Casualty or theft loss(es). Attach Form 4684. (See instructions.)	20	
Job Expenses and Certain Miscellaneous Deductions	21 Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.) ►	21	
	22 Tax preparation fees	22	1,630.
	23 Other expenses - investment, safe deposit box, etc. List type and amount ► SEE STATEMENT 6	23	1,766.
	24 Add lines 21 through 23	24	3,396.
	25 Enter amount from Form 1040, line 38	25	220,216.
	26 Multiply line 25 by 2% (.02)	26	4,404.
	27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27	0.
Other Miscellaneous Deductions	28 Other - from list in instructions. List type and amount ► FROM K-1 - MDRJB PARTNERSHIP	28	6.
Total Itemized Deductions	29 Is Form 1040, line 38, over \$150,000? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input checked="" type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	29	55,221. STMT 9
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here		

SCHEDULE B
(Form 1040A or 1040)

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

Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.

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

OMB No. 1545-0074

2013

Attachment
Sequence No. 08

Your social security number

BRADLEY S. SCHNEIDER

Part I
Interest

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

THE PRIVATEBANK
FROM K-1 - MDRJB PARTNERSHIP
FROM K-1 - AERODIRECT FUND II, LLC

Amount

18.
4.
1.

1

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

- 2 Add the amounts on line 1
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815
4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶

23.
23.

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

Part II
Ordinary Dividends

- 5 List name of payer ▶
CHARLES SCHWAB & CO., INC.
MESIROW FINANCIAL
MESIROW FINANCIAL
NATIONAL FINANCIAL SERVICES LLC

Amount

74.
3.
354.
2,815.

5

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

SUBTOTAL FOR LINE 5
TAX-EXEMPT DIVIDENDS **SEE STATEMENT 10**

3,246.
-146.

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

3,100.

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

Part III
Foreign Accounts and Trusts

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

- 7a At any time during 2013, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions
If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), formerly TD F 90-22.1 to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements

Yes	No
	X

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

- 8 During 2013, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions

	X
--	---

327501
09-30-13

Interest and Dividend Summary

Name: BRADLEY S. SCHNEIDER

FEIN/SSN: [REDACTED]

Payer	Interest	Interest on U.S. Savings Bonds	Tax-Exempt Interest	Private Activity Interest	Original Issue Discount (OID)	Ordinary Dividends	Qualified Dividends	Capital Gain Distributions	Federal Income Tax Withheld	State Tax Withheld	Foreign Tax Paid
THE PRIVATEBANK	18.										
MESIROW FINANCIAL											
MESIROW FINANCIAL - TAX-EXEMPT											
FEES											
CHARLES SCHWAB & CO., INC.						74.	74.				
MESIROW FINANCIAL						3.					
MESIROW FINANCIAL						222.		63.			
NATIONAL FINANCIAL SERVICES											
LLC				14.		2,801.	1,078.	1,087.			
MESIROW FINANCIAL - ACCRUED											
INTEREST PURCHASED											
FROM K-1 - MDRJB PARTNERSHIP	4.										
FROM K-1 - AERODIRECT FUND II,											
LLC	1.										
TOTALS	23.			14.		3,100.	1,152.	1,150.			

SCHEDULE C
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Profit or Loss From Business

(Sole Proprietorship)

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

OMB No. 1545-0074

2013

Attachment
Sequence No. **09**

Name of proprietor

BRADLEY S. SCHNEIDER

Social security number (SSN)

8 Enter code from instructions

524210

A Principal business or profession, including product or service (see instructions)

INSURANCE SALES

C Business name. If no separate business name, leave blank.

DAVIS DANN ADLER SCHNEIDER, LLC

D Employer ID number (EIN), (see instr.)

36-4153252

E Business address (including suite or room no.) ▶

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

F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ▶

G Did you "materially participate" in the operation of this business during 2013? If "No," see instructions for limit on losses ☒ Yes ☐ No

H If you started or acquired this business during 2013, check here ☐

I Did you make any payments in 2013 that would require you to file Form(s) 1099? (see instructions) ☐ Yes ☒ No

J If "Yes," did you or will you file required Forms 1099? ☐ Yes ☐ No

Part I Income

1 Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	1	69,784.
2 Returns and allowances	2	
3 Subtract line 2 from line 1	3	69,784.
4 Cost of goods sold (from line 42)	4	
5 Gross profit. Subtract line 4 from line 3	5	69,784.
6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	6	
7 Gross income. Add lines 5 and 6	7	69,784.

Part II Expenses

Enter expenses for business use of your home only on line 30.

8 Advertising	8		18 Office expense	18	
9 Car and truck expenses (see instructions)	9		19 Pension and profit-sharing plans	19	
10 Commissions and fees	10		20 Rent or lease (see instructions):		
11 Contract labor (see instructions)	11		a Vehicles, machinery, and equipment	20a	
12 Depletion	12		b Other business property	20b	
13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13		21 Repairs and maintenance	21	
14 Employee benefit programs (other than on line 19)	14		22 Supplies (not included in Part III)	22	
15 Insurance (other than health)	15		23 Taxes and licenses	23	
16 Interest:			24 Travel, meals, and entertainment:		
a Mortgage (paid to banks, etc.)	16a		a Travel	24a	
b Other	16b		b Deductible meals and entertainment (see instructions)	24b	
17 Legal and professional services	17		25 Utilities	25	
			26 Wages (less employment credits)	26	
			27 a Other expenses (from line 48)	27a	
			b Reserved for future use	27b	

28 Total expenses before expenses for business use of home. Add lines 8 through 27a	28	0.
29 Tentative profit or (loss). Subtract line 28 from line 7	29	69,784.

30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions).

Simplified method filers only: enter the total square footage of: (a) your home: _____
and (b) the part of your home used for business: _____.

Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30

31 **Net profit or (loss).** Subtract line 30 from line 29.

• If a profit, enter on both **Form 1040, line 12** (or **Form 1040NR, line 13**) and on **Schedule SE, line 2**.
(If you checked the box on line 1, see instructions). Estates and trusts, enter on **Form 1041, line 3**.

• If a loss, you **must** go to line 32.

32 If you have a loss, check the box that describes your investment in this activity (see instructions).

• If you checked 32a, enter the loss on both **Form 1040, line 12**, (or **Form 1040NR, line 13**) and on **Schedule SE, line 2**.
(If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on **Form 1041, line 3**.

• If you checked 32b, you **must** attach **Form 6198**. Your loss may be limited.

32a ☐ All investment is at risk.
32b ☐ Some investment is not at risk.

31 **69,784.**

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

Schedule C (Form 1040) 2013

2013 DEPRECIATION AND AMORTIZATION REPORT
DAVIS DANN ADLER SCHNEIDER, LLC

SCHEDULE C- 1

[illegible]

**SCHEDULE D
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)**Capital Gains and Losses**

▶ Attach to Form 1040 or Form 1040NR.

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

OMB No. 1545-0074

2013Attachment
Sequence No. **12**

Name(s) shown on return

Your social security number

BRADLEY S. SCHNEIDER**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	16,850.	17,142.		<292.>
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	67,853.	68,839.		<986.>
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824			4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions			6	()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	<1,278.>

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	7,326.	7,130.		196.
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	132,574.	127,780.	14.	4,808.
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	SEE STATEMENT 13 SEE STATEMENT 14		11	18,289.
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	<9.>
13 Capital gain distributions	SEE STATEMENT 15		13	1,150.
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	()
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then go to Part III on page 2			15	24,434.

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

Schedule D (Form 1040) 2013

Part III Summary

16 Combine lines 7 and 15 and enter the result	16	23,156.
<ul style="list-style-type: none"> • If line 16 is a gain, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 22. 		
17 Are lines 15 and 16 both gains? <input checked="" type="checkbox"/> Yes. Go to line 18. <input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.		
18 Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions	18	
19 Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions SEE STATEMENT 16	19	5,151.
20 Are lines 18 and 19 both zero or blank? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below. <input checked="" type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21 If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of: <div style="display: flex; align-items: center;"> <ul style="list-style-type: none"> • The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500) <div style="font-size: 3em; margin: 0 10px;">}</div> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> </div> <p>Note. When figuring which amount is smaller, treat both amounts as positive numbers.</p>	21	()
22 Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b? <input type="checkbox"/> Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). <input type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.		

Schedule D (Form 1040) 2013

Sales and Other Dispositions of Capital Assets

OMB No. 1545-0074

2013

Attachment
Sequence No. **12A**

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

Name(s) shown on return

Social security number or taxpayer identification no.

BRADLEY S. SCHNEIDER

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

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

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

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

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

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

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

[illegible]

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

Social security number or taxpayer identification no.

██████████

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

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

- ☐ (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

[illegible]

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) ►

132,574.	127,780.		14.	4,808.
----------	----------	--	-----	--------

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)

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

2013

Attachment
Sequence No. 13

Name(s) shown on return

Your social security number

BRADLEY S. SCHNEIDER

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 2013 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** [REDACTED]**B****C**

1b	Type of Property (from list below)	2	Fair Rental Days	Personal Use Days	QJV
A	1	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.	A 365		<input type="checkbox"/>
B			B		<input type="checkbox"/>
C			C		<input type="checkbox"/>

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	20,182.		
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	1,637.		
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			
15 Supplies	15			
16 Taxes	16	7,463.		
17 Utilities	17			
18 Depreciation expense or depletion	18	9,246.		
19 Other (list) ▶	19			
20 Total expenses. Add lines 5 through 19	20	18,346.		
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	1,836.		
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	20,182.		
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	9,246.		
e Total of all amounts reported on line 20 for all properties	23e	18,346.		
24 Income. Add positive amounts shown on line 21. Do not include any losses	24		1,836.	
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		1,836.	

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

Schedule E (Form 1040) 2013

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

Your social security number

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

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

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

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	MDRJB PARTNERSHIP	P		20-8575774	
B	AERODIRECT FUND II, LLC	P		20-8396751	
C	LEAD-OUT THIRD SOLUTIONS INVESTMENT, LLC	P		27-2461596	
D	AERODIRECT FUND III, LLC	P		90-0934844	

Passive Income and Loss			Nonpassive Income and Loss		
(f) Passive loss allowed (attach Form 8582 if required)	(g) Passive income from Schedule K-1	(h) Nonpassive loss from Schedule K-1	(i) Section 179 expense deduction from Form 4562	(j) Nonpassive income from Schedule K-1	
A 5,054.					
B		26.			
C 0.					
D 269.					
29a Totals					
b Totals 5,323.		26.			
30 Add columns (g) and (j) of line 29a				30	
31 Add columns (f), (h), and (i) of line 29b				31	(5,349.)
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below				32	-5,349.

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		
Passive Income and Loss		Nonpassive Income and Loss
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1
A		
B		
34a Totals		
b Totals		
35 Add columns (d) and (f) of line 34a		35
36 Add columns (c) and (e) of line 34b		36 ()
37 Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and include in the total on line 41 below		37

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

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

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

39

Part V Summary * ENTIRE DISPOSITION OF PASSIVE ACTIVITY

40 Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41 Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18	41	-3,513.
42 Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code V; and Schedule K-1 (Form 1041), box 14, code F (see instructions)	42	
43 Reconciliation for real estate professionals. If you were a real estate professional (see instructions), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Schedule E (Form 1040) 2013

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough MDRJB PARTNERSHIP
PARTNERSHIP

ID 20-8575774

TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	936.							
Rental real estate income (loss)	-5,990.							
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-5,054.							-5,054.
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-5,054.							-5,054.
FORM 4797								
Section 1231 gain (loss)	18,289.							18,289.
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles ..								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions	1.							1.
Deductions related to portfolio income	777.							777.
Other								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough MDRJB PARTNERSHIP
PARTNERSHIP

ID 20-8575774

TAXPAYER

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income	4.							4.
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86	401.							401.
Adjusted gain or loss	-602.							-602.
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits	11.							11.
Casualty and theft loss								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough AERODIRECT FUND II, LLC

ID 20-8396751

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	-24.							
Rental real estate income (loss)								
Other net rental income (loss)	-2.							
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-26.							-26.
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-26.							-26.
FORM 4797								
Section 1231 gain (loss)								
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)	-9.							-9.
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income								
Other								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough AERODIRECT FUND II, LLC

ID 20-8396751

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income	1.							1.
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86								
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough LEAD-OUT THIRD SOLUTIONS INVESTMENT, LLC

ID 27-2461596

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)								
Rental real estate income (loss)								
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)								
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)								
FORM 4797								
Section 1231 gain (loss)								
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income	120.							120.
Other								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough LEAD-OUT THIRD SOLUTIONS INVESTMENT, LLC

ID 27-2461596

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income								
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86								
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 1

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough AERODIRECT FUND III, LLC

ID 90-0934844

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
SCHEDULE E, PAGE 2								
Ordinary business income (loss)	-269.							
Rental real estate income (loss)								
Other net rental income (loss)								
Intangible drilling costs/dry hole costs								
Self-charged passive interest expense								
Guaranteed payments								
Section 179 and carryover								
Disallowed section 179 expense								
Excess farm loss								
Net income (loss)	-269.							-269.
First passive other								
Second passive other								
Cost depletion								
Percentage depletion								
Depletion carryover								
Disallowed due to 65% limitation								
Unreimbursed expenses (nonpassive)								
Nonpassive other								
Total Schedule E (page 2)	-269.							-269.
FORM 4797								
Section 1231 gain (loss)								
Section 179 recapture on disposition								
SCHEDULE D								
Net short-term cap. gain (loss)								
Net long-term cap. gain (loss)								
Section 1256 contracts & straddles								
FORM 4952								
Investment interest expense - Sch. A								
Other net investment income								
ITEMIZED DEDUCTIONS								
Charitable contributions								
Deductions related to portfolio income								
Other								

INCOME FROM PASSTHROUGH STATEMENT, PAGE 2

2013

SCHEDULE E

Name BRADLEY S. SCHNEIDER

SSN/EIN

Passthrough AERODIRECT FUND III, LLC

ID 90-0934844

TAXPAYER

PARTNERSHIP

OTHER PASSIVE	K-1 Input	Prior Year Unallowed Basis Loss	Disallowed Due to Basis Limitation	Prior Year Unallowed At-Risk Loss	Disallowed Due to At-Risk	Prior Year Passive Loss	Disallowed Passive Loss	Tax Return
INTEREST AND DIVIDENDS								
Interest income								
Interest from U.S. bonds								
Ordinary dividends								
Qualified dividends								
Tax-exempt interest income								
FORM 6251								
Depreciation adjustment after 12/31/86								
Adjusted gain or loss								
Beneficiary's AMT adjustment								
Depletion (other than oil)								
Other								
MISCELLANEOUS								
Self-employment earnings (loss)/Wages								
Gross farming & fishing inc								
Royalties								
Royalty expenses/depletion								
Undistributed capital gains credit								
Backup withholding								
Credit for estimated tax								
Cancellation of debt								
Medical insurance - 1040								
Dependent care benefits								
Retirement plans								
Qualified production activities income								
Passthrough adjustment to Form 1040								
Penalty on early withdrawal of savings								
NOL								
Other taxes/recapture of credits								
Credits								
Casualty and theft loss								

RESIDENTIAL RESIDENCE - [REDACTED]

SCHEDULE E- 1

[illegible]

General Business Credit

► Information about Form 3800 and its separate instructions is at www.irs.gov/form3800.
► You must attach all pages of Form 3800, pages 1, 2, and 3, to your tax return.

OMB No. 1545-0895

2013
Attachment
Sequence No. **22**

BRADLEY S. SCHNEIDER

Identifying number

Part I **Current Year Credit for Credits Not Allowed Against Tentative Minimum Tax (TMT)**
(See instructions and complete Part(s) III before Parts I and II)

1	General business credit from line 2 of all Parts III with box A checked	1	
2	Passive activity credits from line 2 of all Parts III with box B checked	2	11.
3	Enter the applicable passive activity credits allowed for 2013 (see instructions)	3	11.
4	Carryforward of general business credit to 2013. Enter the amount from line 2 of Part III with box C checked. See instructions for statement to attach	4	42.
5	Carryback of general business credit from 2014. Enter the amount from line 2 of Part III with box D checked	5	
6	Add lines 1, 3, 4, and 5	6	53.

Part II **Allowable Credit**

7	Regular tax before credits:		
	<ul style="list-style-type: none"> Individuals. Enter the amount from Form 1040, line 44, or Form 1040NR, line 42 Corporations. Enter the amount from Form 1120, Schedule J, Part I, line 2; or the applicable line of your return Estates and trusts. Enter the sum of the amounts from Form 1041, Schedule G, lines 1a and 1b; or the amount from the applicable line of your return 	7	38,745.
8	Alternative minimum tax:		
	<ul style="list-style-type: none"> Individuals. Enter the amount from Form 6251, line 35 Corporations. Enter the amount from Form 4626, line 14 Estates and trusts. Enter the amount from Schedule I (Form 1041), line 56 	8	6,713.
9	Add lines 7 and 8	9	45,458.
10a	Foreign tax credit	10a	
b	Certain allowable credits (see instructions)	10b	
c	Add lines 10a and 10b	10c	
11	Net income tax. Subtract line 10c from line 9. If zero, skip lines 12 through 15 and enter -0- on line 16	11	45,458.
12	Net regular tax. Subtract line 10c from line 7. If zero or less, enter -0-	12	38,745.
13	Enter 25% (.25) of the excess, if any, of line 12 over \$25,000 (see instructions)	13	6,561.
14	Tentative minimum tax:		
	<ul style="list-style-type: none"> Individuals. Enter the amount from Form 6251, line 33 Corporations. Enter the amount from Form 4626, line 12 Estates and trusts. Enter the amount from Schedule I (Form 1041), line 54 	14	45,458.
15	Enter the greater of line 13 or line 14	15	45,458.
16	Subtract line 15 from line 11. If zero or less, enter -0-	16	0.
17	Enter the smaller of line 6 or line 16	17	0.
	C corporations: See the line 17 instructions if there has been an ownership change, acquisition, or reorganization.		

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 3800 (2013)

Part II Allowable Credit (Continued)**Note.** If you are not required to report any amounts on lines 22 or 24 below, skip lines 18 through 25 and enter -0- on line 26.

18	Multiply line 14 by 75% (.75) (see instructions)	18	
19	Enter the greater of line 13 or line 18	19	
20	Subtract line 19 from line 11. If zero or less, enter -0-	20	
21	Subtract line 17 from line 20. If zero or less, enter -0-	21	
22	Combine the amounts from line 3 of all Parts III with box A, C, or D checked	22	
23	Passive activity credit from line 3 of all Parts III with box B checked 23		
24	Enter the applicable passive activity credit allowed for 2013 (see instructions)	24	
25	Add lines 22 and 24	25	
26	Empowerment zone and renewal community employment credit allowed. Enter the smaller of line 21 or line 25	26	0.
27	Subtract line 13 from line 11. If zero or less, enter -0-	27	38,897.
28	Add lines 17 and 26	28	
29	Subtract line 28 from line 27. If zero or less, enter -0-	29	38,897.
30	Enter the general business credit from line 5 of all Parts III with box A checked	30	
31	Reserved	31	
32	Passive activity credits from line 5 of all Parts III with box B checked 32		
33	Enter the applicable passive activity credits allowed for 2013 (see instructions)	33	
34	Carryforward of business credit to 2013. Enter the amount from line 5 of Part III with box C checked and line 6 of Part III with box G checked. See instructions for statement to attach	34	
35	Carryback of business credit from 2014. Enter the amount from line 5 of Part III with box D checked (see instructions)	35	
36	Add lines 30, 33, 34, and 35	36	
37	Enter the smaller of line 29 or line 36	37	
38	Credit allowed for the current year. Add lines 28 and 37. Report the amount from line 38 (if smaller than the sum of Part I, line 6, and Part II, lines 25 and 36, see instructions) as indicated below or on the applicable line of your return: <ul style="list-style-type: none"> • Individuals. Form 1040, line 53, or Form 1040NR, line 50 • Corporations. Form 1120, Schedule J, Part I, line 5c • Estates and trusts. Form 1041, Schedule G, line 2b 	38	

Form **3800** (2013)

Name(s) shown on return

BRADLEY S. SCHNEIDER

Identifying number

Part III General Business Credits or Eligible Small Business Credits (see instructions)

Complete a separate Part III for each box checked below. (see instructions)

- A ☐ General Business Credit From a Non-Passive Activity E ☐ Reserved
 B ☒ General Business Credit From a Passive Activity F ☐ Reserved
 C ☐ General Business Credit Carryforwards G ☐ Eligible Small Business Credit Carryforwards
 D ☐ General Business Credit Carrybacks H ☐ Reserved

I If you are filing more than one Part III with box A or B checked, complete and attach first an additional Part III combining amounts from all Parts III with box A or B checked. Check here if this is the consolidated Part III ☐

(a) Description of credit	(b) If claiming the credit from a pass-through entity, enter the EIN	(c) Enter the appropriate amount
1a Investment (Form 3468, Part II only) (attach Form 3468)	1a	
b Reserved	1b	
c Increasing research activities (Form 6765)	1c 20-8575774	11.
d Low-income housing (Form 8586, Part I only)	1d	
e Disabled access (Form 8826) (see instructions for limitation)	1e	
f Renewable electricity, refined coal, and Indian coal production (Form 8835)	1f	
g Indian employment (Form 8845)	1g	
h Orphan drug (Form 8820)	1h	
i New markets (Form 8874)	1i	
j Small employer pension plan startup costs (Form 8881) (see instructions for limitation)	1j	
k Employer-provided child care facilities and services (Form 8882) (see instructions for limitation)	1k	
l Biodiesel and renewable diesel fuels (attach Form 8864)	1l	
m Low sulfur diesel fuel production (Form 8896)	1m	
n Distilled spirits (Form 8906)	1n	
o Nonconventional source fuel (Form 8907)	1o	
p Energy efficient home (Form 8908)	1p	
q Energy efficient appliance (Form 8909)	1q	
r Alternative motor vehicle (Form 8910)	1r	
s Alternative fuel vehicle refueling property (Form 8911)	1s	
t Reserved	1t	
u Mine rescue team training (Form 8923)	1u	
v Agricultural chemicals security (Form 8931) (see instructions for limitation)	1v	
w Employer differential wage payments (Form 8932)	1w	
x Carbon dioxide sequestration (Form 8933)	1x	
y Qualified plug-in electric drive motor vehicle (Form 8936)	1y	
z Qualified plug-in electric vehicle (carryforward only)	1z	
aa New hire retention (carryforward only)	1aa	
bb General credits from an electing large partnership (Schedule K-1 (Form 1065-B))	1bb	
zz Other	1zz	
2 Add lines 1a through 1zz and enter here and on the applicable line of Part I	2	11.
3 Enter the amount from Form 8844 here and on the applicable line of Part II	3	
4a Investment (Form 3468, Part III) (attach Form 3468)	4a	
b Work opportunity (Form 5884)	4b	
c Biofuel producer (Form 6478)	4c	
d Low-income housing (Form 8586, Part II)	4d	
e Renewable electricity, refined coal, and Indian coal production (Form 8835)	4e	
f Employer social security and Medicare taxes paid on certain employee tips (Form 8846)	4f	
g Qualified railroad track maintenance (Form 8900)	4g	
h Small employer health insurance premiums (Form 8941)	4h	
i Reserved	4i	
j Reserved	4j	
z Other	4z	
5 Add lines 4a through 4z and enter here and on the applicable line of Part II	5	
6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II	6	11.

Name(s) shown on return

BRADLEY S. SCHNEIDER

Identifying number

Part III General Business Credits or Eligible Small Business Credits (see instructions)

Complete a separate Part III for each box checked below. (see instructions)

- A ☐ General Business Credit From a Non-Passive Activity E ☐ Reserved
 B ☐ General Business Credit From a Passive Activity F ☐ Reserved
 C ☒ General Business Credit Carryforwards G ☐ Eligible Small Business Credit Carryforwards
 D ☐ General Business Credit Carrybacks H ☐ Reserved

I If you are filing more than one Part III with box A or B checked, complete and attach first an additional Part III combining amounts from all Parts III with box A or B checked. Check here if this is the consolidated Part III ☐

(a) Description of credit	(b) If claiming the credit from a pass-through entity, enter the EIN	(c) Enter the appropriate amount
1a Investment (Form 3468, Part II only) (attach Form 3468)	1a	
b Reserved	1b	
c Increasing research activities (Form 6765)	1c	42.
d Low-income housing (Form 8586, Part I only)	1d	
e Disabled access (Form 8826) (see instructions for limitation)	1e	
f Renewable electricity, refined coal, and Indian coal production (Form 8835)	1f	
g Indian employment (Form 8845)	1g	
h Orphan drug (Form 8820)	1h	
i New markets (Form 8874)	1i	
j Small employer pension plan startup costs (Form 8881) (see instructions for limitation)	1j	
k Employer-provided child care facilities and services (Form 8882) (see instructions for limitation)	1k	
l Biodiesel and renewable diesel fuels (attach Form 8864)	1l	
m Low sulfur diesel fuel production (Form 8896)	1m	
n Distilled spirits (Form 8906)	1n	
o Nonconventional source fuel (Form 8907)	1o	
p Energy efficient home (Form 8908)	1p	
q Energy efficient appliance (Form 8909)	1q	
r Alternative motor vehicle (Form 8910)	1r	
s Alternative fuel vehicle refueling property (Form 8911)	1s	
t Reserved	1t	
u Mine rescue team training (Form 8923)	1u	
v Agricultural chemicals security (Form 8931) (see instructions for limitation)	1v	
w Employer differential wage payments (Form 8932)	1w	
x Carbon dioxide sequestration (Form 8933)	1x	
y Qualified plug-in electric drive motor vehicle (Form 8936)	1y	
z Qualified plug-in electric vehicle (carryforward only)	1z	
aa New hire retention (carryforward only)	1aa	
bb General credits from an electing large partnership (Schedule K-1 (Form 1065-B))	1bb	
zz Other	1zz	
2 Add lines 1a through 1zz and enter here and on the applicable line of Part I	2	42.
3 Enter the amount from Form 8844 here and on the applicable line of Part II	3	
4a Investment (Form 3468, Part III) (attach Form 3468)	4a	
b Work opportunity (Form 5884)	4b	
c Biofuel producer (Form 6478)	4c	
d Low-income housing (Form 8586, Part II)	4d	
e Renewable electricity, refined coal, and Indian coal production (Form 8835)	4e	
f Employer social security and Medicare taxes paid on certain employee tips (Form 8846)	4f	
g Qualified railroad track maintenance (Form 8900)	4g	
h Small employer health insurance premiums (Form 8941)	4h	
i Reserved	4i	
j Reserved	4j	
z Other	4z	
5 Add lines 4a through 4z and enter here and on the applicable line of Part II	5	
6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II	6	42.

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

Name(s) shown on return

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

▶ Attach to your tax return.

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

OMB No. 1545-0184

2013Attachment
Sequence No. **27****BRADLEY S. SCHNEIDER**

Identifying number

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

(a) Description of property	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or other basis, plus improvements and expense of sale	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
2 MDRJB PARTNERSHIP						18,289.

3 Gain, if any, from Form 4684, line 39**3****4** Section 1231 gain from installment sales from Form 6252, line 26 or 37**4****5** Section 1231 gain or (loss) from like-kind exchanges from Form 8824**5****6** Gain, if any, from line 32, from other than casualty or theft**6****7** Combine lines 2 through 6. Enter the gain or (loss) here and on the appropriate line as follows:**7****18,289.****Partnerships (except electing large partnerships) and S corporations.** Report the gain or (loss) following the instructions for Form 1065, Schedule K, line 10, or Form 1120S, Schedule K, line 9. Skip lines 8, 9, 11, and 12 below.**Individuals, partners, S corporation shareholders, and all others.** If line 7 is zero or a loss, enter the amount from line 7 on line 11 below and skip lines 8 and 9. If line 7 is a gain and you did not have any prior year section 1231 losses, or they were recaptured in an earlier year, enter the gain from line 7 as a long-term capital gain on the Schedule D filed with your return and skip lines 8, 9, 11, and 12 below.**8** Nonrecaptured net section 1231 losses from prior years (see instructions)**8****9** Subtract line 8 from line 7. If zero or less, enter -0-. If line 9 is zero, enter the gain from line 7 on line 12 below. If line 9 is more than zero, enter the amount from line 8 on line 12 below and enter the gain from line 9 as a long-term capital gain on the Schedule D filed with your return (see instructions)**9****Part II Ordinary Gains and Losses** (see instructions)**10** Ordinary gains and losses not included on lines 11 through 16 (include property held 1 year or less):

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

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form **4797** (2013)

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

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

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

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

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

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

Alternative Minimum Tax - Individuals▶ Information about Form 6251 and its separate instructions is at www.irs.gov/form6251.

▶ Attach to Form 1040 or Form 1040NR.

2013Attachment
Sequence No. **32**

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

Your social security number

BRADLEY S. SCHNEIDER**Part I Alternative Minimum Taxable Income**

1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41, and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.)	1	164,995.
2	Medical and dental. If you or your spouse was 65 or older, enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3	Taxes from Schedule A (Form 1040), line 9	3	27,572.
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	5	
6	If Form 1040, line 38, is \$150,000 or less, enter -0-. Otherwise, see instructions	6	-2,106.
7	Tax refund from Form 1040, line 10 or line 21	7	
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Alternative tax net operating loss deduction	11	
12	Interest from specified private activity bonds exempt from the regular tax SEE STATEMENT 19	12	14.
13	Qualified small business stock (7% of gain excluded under section 1202)	13	
14	Exercise of incentive stock options (excess of AMT income over regular tax income)	14	
15	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	15	
16	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	16	
17	Disposition of property (difference between AMT and regular tax gain or loss)	17	
18	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	18	
19	Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 17	19	-201.
20	Loss limitations (difference between AMT and regular tax income or loss)	20	
21	Circulation costs (difference between regular tax and AMT)	21	
22	Long-term contracts (difference between AMT and regular tax income)	22	
23	Mining costs (difference between regular tax and AMT)	23	
24	Research and experimental costs (difference between regular tax and AMT)	24	
25	Income from certain installment sales before January 1, 1987	25	
26	Intangible drilling costs preference	26	
27	Other adjustments, including income-based related adjustments	27	
28	Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$238,550, see instructions.)	28	190,274.

Part II Alternative Minimum Tax (AMT)

29	Exemption. (If you were under age 24 at the end of 2013, see instructions.)		
IF your filing status is... AND line 28 is not over... THEN enter on line 29...			
Single or head of household \$115,400 \$51,900			
Married filing jointly or qualifying widow(er) ... 153,900 80,800			
Married filing separately 76,950 40,400 STMT 18			
If line 28 is over the amount shown above for your filing status, see instructions.			
29		29	12,069.
30	Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34	30	178,205.
31	• If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 60 here. • All others: If line 30 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result.	31	45,458.
32	Alternative minimum tax foreign tax credit (see instructions)	32	
33	Tentative minimum tax. Subtract line 32 from line 31	33	45,458.
34	Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Sch J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Sch J	34	38,745.
35	AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	35	6,713.

Part III Tax Computation Using Maximum Capital Gains Rates

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

36 Enter the amount from Form 6251, line 30. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions for line 31	36	178,205.
37 Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	37	19,157.
38 Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	38	5,151.
39 If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	39	24,308.
40 Enter the smaller of line 36 or line 39	40	24,308.
41 Subtract line 40 from line 36	41	153,897.
42 If line 41 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	42	41,296.
43 Enter: <ul style="list-style-type: none"> • \$72,500 if married filing jointly or qualifying widow(er), • \$36,250 if single or married filing separately, or • \$48,600 if head of household. 	43	36,250.
44 Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter the amount from Form 1040, line 43; but do not enter less than -0-	44	145,838.
45 Subtract line 44 from line 43. If zero or less, enter -0-	45	0.
46 Enter the smaller of line 36 or line 37	46	19,157.
47 Enter the smaller of line 45 or line 46. This amount is taxed at 0%	47	0.
48 Subtract line 47 from line 46	48	19,157.
49 Enter the amount from the Line 49 Worksheet in the instructions STMT 20	49	84,313.
50 Enter the smaller of line 48 or line 49	50	19,157.
51 Multiply line 50 by 15% (.15)	51	2,874.
52 Add lines 47 and 50	52	19,157.
If lines 52 and 36 are the same, skip lines 53 through 57 and go to line 58. Otherwise, go to line 53.		
53 Subtract line 52 from line 46	53	0.
54 Multiply line 53 by 20% (.20)	54	
If line 38 is zero or blank, skip lines 55 through 57 and go to line 58. Otherwise, go to line 55.		
55 Add lines 41, 52, and 53	55	173,054.
56 Subtract line 55 from line 36	56	5,151.
57 Multiply line 56 by 25% (.25)	57	1,288.
58 Add lines 42, 51, 54, and 57	58	45,458.
59 If line 36 is \$179,500 or less (\$89,750 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,590 (\$1,795 if married filing separately) from the result	59	48,102.
60 Enter the smaller of line 58 or line 59 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 31. Instead, enter it on line 4 of the worksheet in the instructions for line 31	60	45,458.

Form 6251 (2013)

ALTERNATIVE MINIMUM TAX RECONCILIATION REPORT							
Name(s)							Social Security Number
BRADLEY S. SCHNEIDER							
Form Name	Description	Income	Adjustment				
			Form 6251, Line 17	Form 6251, Line 18	Form 6251, Line 19	Form 6251, Line 20	Form 6251 Other Adjustment
4797	MDRJB PARTNERSHIP						
	* REGULAR INCOME	18,289.					
	* AMT NET INCOME	18,289.					
K1-	MDRJB PARTNERSHIP						
	* REGULAR INCOME	-5,054.					
	AMT ADJUSTMENTS	-201.			-201.		
	* AMT NET INCOME	-5,255.			-201.		
K1-	AERODIRECT FUND III, L						
	LC						
	* REGULAR INCOME	-269.					
	* AMT NET INCOME	-269.					
E-	RESIDENTIAL RESIDENCE						
	- [REDACTED]						
	* REGULAR INCOME	1,836.					
	* AMT NET INCOME	1,836.					
	** TOTAL ADJ & PREF **				-201.		

ALTERNATIVE MINIMUM TAX DEPRECIATION REPORT

Asset No.	Description	Date Acquired	AMT Method	AMT Life	AMT Cost Or Basis	AMT Accumulated	Regular Depreciation	AMT Depreciation	AMT Adjustment
	DAVIS DANN ADLER SCHNEIDER, LLC								
4	COMPUTER	051508	200DB		1,549.	729.	0.	0.	0.
5	PRINTER/SCANNER	051508	200DB		326.	154.	0.	0.	0.
6	LAPTOP COMPUTER	081208	200DB		2,617.	1,233.	0.	0.	0.
7	BACK UP SYSTEM	110308	200DB		328.	155.	0.	0.	0.
8	WIRELESS BOOSTER	111008	200DB		109.	51.	0.	0.	0.
9	IPHONE	120208	200DB		452.	213.	0.	0.	0.
	RESIDENTIAL RESIDENCE - [REDACTED] DE								
1	RESIDENTIAL RESIDENCE	080101	SL	27.50	254,261.	105,173.	9,246.	9,246.	0.
	** SUBTOTAL **				254,261.	105,173.	9,246.	9,246.	0.
	*** GRAND TOTAL ***				259,642.	107,708.	9,246.	9,246.	0.

**SCHEDULE H
(Form 1040)**Department of the Treasury
Internal Revenue Service (99)**Household Employment Taxes**

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

▶ **Attach to Form 1040, 1040NR, 1040-SS, or 1041.**▶ **Information about Schedule H and its separate instructions is at www.irs.gov/form1040.**

OMB No. 1545-1971

2013Attachment
Sequence No. **44**

Name of employer

Social security number

Employer identification number

BRADLEY S. SCHNEIDER**45-1994229**

Calendar year taxpayers having no household employees in 2013 do not have to complete this form for 2013.

A Did you pay **any one** household employee cash wages of \$1,800 or more in 2013? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions before you answer this question.)

- ☒ **Yes.** Skip lines B and C and go to line 1.
☐ **No.** Go to line B.

B Did you withhold federal income tax during 2013 for any household employee?

- ☐ **Yes.** Skip line C and go to line 7.
☐ **No.** Go to line C.

C Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2012 or 2013 to **all** household employees? (Do not count cash wages paid in 2012 or 2013 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** **Stop.** Do not file this schedule.
☐ **Yes.** Skip lines 1-9 and go to line 10.

Part I Social Security, Medicare, and Federal Income Taxes

1	Total cash wages subject to social security tax	1	46,536.	
2	Social security tax. Multiply line 1 by 12.4% (.124)	2	5,770.	
3	Total cash wages subject to Medicare tax	3	46,536.	
4	Medicare tax. Multiply line 3 by 2.9% (.029)	4	1,350.	
5	Total cash wages subject to Additional Medicare Tax withholding	5		
6	Additional Medicare Tax withholding. Multiply line 5 by 0.9% (.009)	6		
7	Federal income tax withheld, if any	7	7,000.	
8	Total social security, Medicare, and federal income taxes. Add lines 2, 4, 6, and 7	8	14,120.	

9 Did you pay **total** cash wages of \$1,000 or more in **any** calendar **quarter** of 2012 or 2013 to **all** household employees? (Do not count cash wages paid in 2012 or 2013 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** **Stop.** Include the amount from line 8 above on Form 1040, line 59a. If you are not required to file Form 1040, see the line 9 instructions.
☒ **Yes.** Go to line 10.

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Schedule H (Form 1040) 2013

Yes	No
X	
X	
X	

10	X	
11	X	
12	X	

11	X	
----	---	--

12	X	
----	---	--

If you checked the "No" box on **any** of the lines above, skip Section A and complete Section B.

13	Name of the state where you paid unemployment contributions	IL		
14	Contributions paid to your state unemployment fund	14	71.	
15	Total cash wages subject to FUTA tax	15		7,000.
16	FUTA tax. Multiply line 15 by .6% (.006). Enter the result here, skip Section B, and go to line 25	16		42.

17 Complete all columns below that apply (if you need more space, see instructions):

(a) Name of state	(b) Taxable wages (as defined in state act)	(c) State experience rate period		(d) State experience rate	(e) Multiply col. (b) by .054	(f) Multiply col. (b) by col. (d)	(g) Subtract col. (f) from col. (e). If zero or less, enter -0.-.	(h) Contributions paid to state unemployment fund
		From	To					
18 Totals							18	

18 Totals

19 Add columns (g) and (h) of line 18

20 Total cash wages subject to FUTA tax (see the line 15 instructions)

21 Multiply line 20 by 6.0% (.060)

22 Multiply line 20 by 5.4% (.054)

23 Enter the **smaller** of line 19 or line 22

(Employers in a credit reduction state must use the worksheet and check here)

24 FUTA tax. Subtract line 23 from line 21. Enter the result here and go to line 25

25 Enter the amount from line 8. If you checked the "Yes" box on line C of page 1, enter -0-	25	14,120.
26 Add line 16 (or line 24) and line 25	26	14,162.

27 Are you required to file Form 1040?

☒ **Yes. Stop.** Include the amount from line 26 above on Form 1040, line 59a. **Do not** complete Part IV below.

☐ **No.** You may have to complete Part IV. See instructions for details.

Address (number and street) or P.O. box if mail is not delivered to street address

Apt., room, or suite no.

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

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Employer's signature

Date _____

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ▶

Firm's address ►

Phone no.

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

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

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

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

Name(s) shown on Form 1040

BRADLEY S. SCHNEIDER

Your social security number

Part I Additional Medicare Tax on Medicare Wages

1 Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	150,656.	
2 Unreported tips from Form 4137, line 6	2		
3 Wages from Form 8919, line 6	3		
4 Add lines 1 through 3	4	150,656.	
5 Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying widow(er) \$200,000	5	125,000.	
6 Subtract line 5 from line 4. If the result is zero or less, enter -0-	6		25,656.
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (.009). Enter here and go to Part II	7		231.

Part II Additional Medicare Tax on Self-Employment Income

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

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

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

Part IV Total Additional Medicare Tax

18 Add lines 7, 13, and 17. Also include this amount on Form 1040, line 60, (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions) and go to Part V	18		231.
---	----	--	------

Part V Withholding Reconciliation

19 Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	2,185.	
20 Enter the amount from line 1	20	150,656.	
21 Multiply line 20 by 1.45% (.0145). This is your regular Medicare tax withholding on Medicare wages	21	2,185.	
22 Subtract line 21 from line 19. This is your Additional Medicare Tax withholding on Medicare wages	22		0.
23 Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		
24 Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, line 62 (Form 1040NR, 1040-PR, and 1040-SS filers, see instructions)	24		

Net Investment Income Tax - Individuals, Estates, and Trusts

2013

Attachment
Sequence No. 72Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041.

▶ Information about Form 8960 and its separate instructions is at www.irs.gov/form8960

Name(s) shown on Form 1040 or Form 1041

BRADLEY S. SCHNEIDER

Your social security number or EIN

Part I Investment Income☐ Section 6013(g) election (see instructions)☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (Form 1040, line 8a; or Form 1041, line 1)	1	23.
2	Ordinary dividends (Form 1040, line 9a; or Form 1041, line 2a)	2	3,100.
3	Annuities from nonqualified plans (see instructions)	3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (Form 1040, line 17; or Form 1041, line 5)	4a	-3,513.
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions)	4b	
c	Combine lines 4a and 4b	4c	-3,513.
5a	Net gain or loss from disposition of property from Form 1040, combine lines 13 and 14; or from Form 1041, combine lines 4 and 7	5a	23,156.
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions)	5b	
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions)	5c	
d	Combine lines 5a through 5c	5d	23,156.
6	Changes to investment income for certain CFCs and PFICs (see instructions)	6	
7	Other modifications to investment income (see instructions)	7	
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7	8	22,766.

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions)	9a	
b	State income tax (see instructions)	9b	997.
c	Miscellaneous investment expenses (see instructions)	9c	6.
d	Add lines 9a, 9b, and 9c	9d	1,003.
10	Additional modifications (see instructions)	10	
11	Total deductions and modifications. Add lines 9d and 10	11	1,003.

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11 from Part I, line 8. Individuals complete lines 13-17. Estates and trusts complete lines 18a-21. If zero or less, enter -0-	12	21,763.
Individuals:			
13	Modified adjusted gross income (see instructions)	13	220,216.
14	Threshold based on filing status (see instructions)	14	125,000.
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	95,216.
16	Enter the smaller of line 12 or line 15	16	21,763.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and on Form 1040, line 60	17	827.
Estates and Trusts:			
18a	Net investment income (line 12 above)	18a	
b	Deductions for distributions of net investment income and deductions under section 642(c) (see instructions)	18b	
c	Undistributed net investment income. Subtract line 18b from 18a (see instructions)	18c	
19a	Adjusted gross income (see instructions)	19a	
b	Highest tax bracket for estates and trusts for the year (see instructions)	19b	
c	Subtract line 19b from line 19a. If zero or less, enter -0-	19c	
20	Enter the smaller of line 18c or line 19c	20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (.038). Enter here and on Form 1041, Schedule G, line 4	21	

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

Form 8960 (2013)

**Credit for Prior Year Minimum Tax -
Individuals, Estates, and Trusts**► Information about Form 8801 and its separate instructions is at www.irs.gov/form8801.
► Attach to Form 1040, 1040NR, or 1041.**2013**Attachment
Sequence No. **74**

Name(s) shown on return

Identifying number

BRADLEY S. SCHNEIDER**Part I Net Minimum Tax on Exclusion Items**

1 Combine lines 1 and 10 of your 2012 Form 6251. Estates and trusts, see instructions	1	
2 Enter adjustments and preferences treated as exclusion items (see instructions)	2	51,442.
3 Minimum tax credit net operating loss deduction (see instructions)	3	()
4 Combine lines 1, 2, and 3. If zero or less, enter -0- here and on line 15 and go to Part II. If more than \$232,500 and you were married filing separately for 2012, see instructions	4	
5 Enter: \$78,750 if married filing jointly or qualifying widow(er) for 2012; \$50,600 if single or head of household for 2012; or \$39,375 if married filing separately for 2012. Estates and trusts, enter \$22,500	5	78,750.
6 Enter: \$150,000 if married filing jointly or qualifying widow(er) for 2012; \$112,500 if single or head of household for 2012; or \$75,000 if married filing separately for 2012. Estates and trusts, enter \$75,000	6	150,000.
7 Subtract line 6 from line 4. If zero or less, enter -0- here and on line 8 and go to line 9	7	
8 Multiply line 7 by 25% (.25)	8	
9 Subtract line 8 from line 5. If zero or less, enter -0-. If under age 24 at the end of 2012, see instructions	9	0.
10 Subtract line 9 from line 4. If zero or less, enter -0- here and on line 15 and go to Part II. Form 1040NR filers, see instructions	10	
11 • If for 2012 you filed Form 2555 or 2555-EZ, see instructions for the amount to enter. • If for 2012 you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b (Form 1041, line 2b(2)); or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (lines 14a and 15, column (2), of Schedule D (Form 1041)), complete Part III of Form 8801 and enter the amount from line 45 here. Form 1040NR filers, see instructions. • All others: If line 10 is \$175,000 or less (\$87,500 or less if married filing separately for 2012), multiply line 10 by 26% (.26). Otherwise, multiply line 10 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2012) from the result. Form 1040NR filers, see instructions.	11	156,463.
12 Minimum tax foreign tax credit on exclusion items (see instructions)	12	
13 Tentative minimum tax on exclusion items. Subtract line 12 from line 11	13	156,463.
14 Enter the amount from your 2012 Form 6251, line 34, or 2012 Form 1041, Schedule I, line 55	14	136,725.
15 Net minimum tax on exclusion items. Subtract line 14 from line 13. If zero or less, enter -0-	15	19,738.

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8801** (2013)

Part II Minimum Tax Credit and Carryforward to 2014

16 Enter the amount from your 2012 Form 6251, line 35, or 2012 Form 1041, Schedule I, line 56	16	20,099.
17 Enter the amount from line 15	17	19,738.
18 Subtract line 17 from line 16. If less than zero, enter as a negative amount	18	361.
19 2012 credit carryforward. Enter the amount from your 2012 Form 8801, line 28	19	681.
20 Enter your 2012 unallowed qualified electric vehicle credit (see instructions)	20	
21 Combine lines 18 through 20. If zero or less, stop here and see the instructions	21	1,042.
22 Enter your 2013 regular income tax liability minus allowable credits (see instructions)	22	38,745.
23 Enter the amount from your 2013 Form 6251, line 33, or 2013 Form 1041, Schedule I, line 54	23	45,458.
24 Subtract line 23 from line 22. If zero or less, enter -0-	24	0.
25 Minimum tax credit. Enter the smaller of line 21 or line 24. Also enter this amount on your 2013 Form 1040, line 53 (check box b); Form 1040NR, line 50 (check box b); or Form 1041, Schedule G, line 2c	25	0.
26 Credit carryforward to 2014. Subtract line 25 from line 21. Keep a record of this amount because you may use it in future years	26	1,042.

Form **8801** (2013)

Part III Tax Computation Using Maximum Capital Gains Rates

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

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

27

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

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

28

245,857.

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

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

29

1,343.

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

30

247,200.

- 31 Enter the **smaller** of line 27 or line 30

31

247,200.

- 32 Subtract line 31 from line 27

32

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

33

- 34 Enter:

- \$70,700 if married filing jointly or qualifying widow(er) for 2012,
- \$35,350 if single or married filing separately for 2012,
- \$47,350 if head of household for 2012, or
- \$2,400 for an estate or trust.

Form 1040NR filers, see instructions

34

70,700.

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

35

373,087.

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

36

0.

- 37 Enter the **smaller** of line 27 or line 28

37

245,857.

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

38

- 39 Subtract line 38 from line 37

39

245,857.

- 40 Multiply line 39 by 15% (.15)

40

36,879.

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

- 41 Subtract line 37 from line 31

41

1,343.

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

42

336.

- 43 Add lines 33, 40, and 42

43

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

44

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

45

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

Passive Activity Loss Limitations

▶ See separate instructions.

▶ Attach to Form 1040 or Form 1041.

▶ Information about Form 8582 and its instructions is available at www.irs.gov/form8582

OMB No. 1545-1008

2013

Attachment
Sequence No. **88**

Name(s) shown on return

Identifying number

BRADLEY S. SCHNEIDER

Part I 2013 Passive Activity Loss Caution: Complete Worksheets 1, 2, and 3 before completing Part I.

Rental Real Estate Activities With Active Participation (For the definition of active participation, see

Special Allowance for Rental Real Estate Activities in the instructions.)

1a Activities with net income (enter the amount from Worksheet 1, column (a))	1a	1,836.	
b Activities with net loss (enter the amount from Worksheet 1, column (b))	1b		
c Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	1c		
d Combine lines 1a, 1b, and 1c	1d	1,836.	

Commercial Revitalization Deductions From Rental Real Estate Activities

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

All Other Passive Activities

3a Activities with net income (enter the amount from Worksheet 3, column (a))	3a	18,289.	
b Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	-5,323.	
c Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	3c		
d Combine lines 3a, 3b, and 3c	3d	12,966.	

4 Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used	4	14,802.	
--	----------	---------	--

- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
 - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

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

Part II Special Allowance for Rental Real Estate Activities With Active Participation

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

5 Enter the smaller of the loss on line 1d or the loss on line 4	5		
6 Enter \$150,000. If married filing separately, see instructions	6		
7 Enter modified adjusted gross income, but not less than zero (see instructions)	7		
Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.			
8 Subtract line 7 from line 6	8		
9 Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions	9		
10 Enter the smaller of line 5 or line 9	10		
If line 2c is a loss, go to Part III. Otherwise, go to line 15.			

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

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

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

Part IV Total Losses Allowed

15 Add the income, if any, on lines 1a and 3a and enter the total	15		
16 Total losses allowed from all passive activities for 2013. Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16		

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

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

Worksheet 2 - For Form 8582, Lines 2a and 2b (See instructions.)Worksheet 3 - For Form 8582, Lines 3a, 3b, and 3c (See instructions.)

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

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

Total _____ ▶

Passive Activity Credit Limitations

▶ See separate instructions.

▶ Attach to Form 1040 or 1041.

OMB No. 1545-1034

Attachment
Sequence No. **89**

Identifying number

BRADLEY S. SCHNEIDER**Part I Passive Activity Credits****Caution:** If you have credits from a publicly traded partnership, see *Publicly Traded Partnerships (PTPs)* in the instructions.**Credits From Rental Real Estate Activities With Active Participation (Other Than Rehabilitation Credits and Low-Income Housing Credits)** (See Lines 1a through 1c in the instructions.)**1a** Credits from Worksheet 1, column (a)**1a****b** Prior year unallowed credits from Worksheet 1, column (b)**1b****c** Add lines 1a and 1b**1c****Rehabilitation Credits From Rental Real Estate Activities and Low-Income Housing Credits for Property Placed in Service Before 1990 (or From Pass-Through Interests Acquired Before 1990)** (See Lines 2a through 2c in the instructions.)**2a** Credits from Worksheet 2, column (a)**2a****b** Prior year unallowed credits from Worksheet 2, column (b)**2b****c** Add lines 2a and 2b**2c****Low-Income Housing Credits for Property Placed in Service After 1989** (See Lines 3a through 3c in the instructions.)**3a** Credits from Worksheet 3, column (a)**3a****b** Prior year unallowed credits from Worksheet 3, column (b)**3b****c** Add lines 3a and 3b**3c****All Other Passive Activity Credits** (See Lines 4a through 4c in the instructions.)**4a** Credits from Worksheet 4, column (a)**4a****11.****b** Prior year unallowed credits from Worksheet 4, column (b)**4b****c** Add lines 4a and 4b**4c****11.****5** Add lines 1c, 2c, 3c, and 4c**5****11.****6** Enter the tax attributable to net passive income (see instructions)**6****2,099.****7** Subtract line 6 from line 5. If line 6 is more than or equal to line 5, enter -0- and see instructions**7****0.****Note:** If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II, III, or IV. Instead, go to line 37.**Part II Special Allowance for Rental Real Estate Activities With Active Participation****Note:** Complete this part only if you have an amount on line 1c. Otherwise, go to Part III.**8** Enter the smaller of line 1c or line 7**8****9** Enter \$150,000. If married filing separately, see instructions**9****10** Enter modified adjusted gross income, but not less than zero (see instructions).

If line 10 is equal to or more than line 9, skip lines 11 through 15 and enter -0- on line 16

10**11** Subtract line 10 from line 9**11****12** Multiply line 11 by 50% (.50). Do not enter more than \$25,000. If married filing separately, see instructions**12****13a** Enter the amount, if any, from line 10 of Form 8582**13a****b** Enter the amount, if any, from line 14 of Form 8582**13b****c** Add lines 13a and 13b**13c****14** Subtract line 13c from line 12**14****15** Enter the tax attributable to the amount on line 14 (see instructions)**15****16** Enter the **smaller** of line 8 or line 15**16**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8582-CR** (Rev. 01-2012)

Part III Special Allowance for Rehabilitation Credits From Rental Real Estate Activities and Low-Income Housing Credits for Property Placed in Service Before 1990 (or From Pass-Through Interests Acquired Before 1990)**Note:** Complete this part only if you have an amount on line 2c. Otherwise, go to Part IV.

17	Enter the amount from line 7	17	
18	Enter the amount from line 16	18	
19	Subtract line 18 from line 17. If zero, enter -0- here and on lines 30 and 36, and then go to Part V	19	
20	Enter the smaller of line 2c or line 19	20	
21	Enter \$250,000. If married filing separately, see instructions to find out if you can skip lines 21 through 26	21	
22	Enter modified adjusted gross income, but not less than zero. (See instructions for line 10.) If line 22 is equal to or more than line 21, skip lines 23 through 29 and enter -0- on line 30	22	
23	Subtract line 22 from line 21	23	
24	Multiply line 23 by 50% (.50). Do not enter more than \$25,000. If married filing separately, see instructions	24	
25a	Enter the amount, if any, from line 10 of Form 8582	25a	
b	Enter the amount, if any, from line 14 of Form 8582	25b	
c	Add lines 25a and 25b	25c	
26	Subtract line 25c from line 24	26	
27	Enter the tax attributable to the amount on line 26 (see instructions)	27	
28	Enter the amount, if any, from line 18	28	
29	Subtract line 28 from line 27	29	
30	Enter the smaller of line 20 or line 29	30	

Part IV Special Allowance for Low-Income Housing Credits for Property Placed in Service After 1989**Note:** Complete this part only if you have an amount on line 3c. Otherwise, go to Part V.

31	If you completed Part III, enter the amount from line 19. Otherwise, subtract line 16 from line 7	31	
32	Enter the amount from line 30	32	
33	Subtract line 32 from line 31. If zero, enter -0- here and on line 36	33	
34	Enter the smaller of line 3c or line 33	34	
35	Tax attributable to the remaining special allowance (see instructions)	35	
36	Enter the smaller of line 34 or line 35	36	

Part V Passive Activity Credit Allowed

37	Passive Activity Credit Allowed. Add lines 6, 16, 30, and 36. See instructions to find out how to report the allowed credit on your tax return and how to allocate allowed and unallowed credits if you have more than one credit or credits from more than one activity. If you have any credits from a publicly traded partnership, see Publicly Traded Partnerships (PTPs) in the instructions.	37	11.
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Part VI Election To Increase Basis of Credit Property

38	If you disposed of your entire interest in a passive activity or former passive activity in a fully taxable transaction, and you elect to increase your basis in credit property used in that activity by the unallowed credit that reduced your basis in the property, check this box. See instructions	<input type="checkbox"/>
39	Name of passive activity disposed of ▶	
40	Description of the credit property for which the election is being made ▶	
41	Amount of unallowed credit that reduced your basis in the property	▶ \$

Form **8582-CR** (Rev. 01-2012)

Form **8582**Department of the Treasury
Internal Revenue Service (99)**ALTERNATIVE MINIMUM TAX**
Passive Activity Loss Limitations

▶ See separate instructions.

▶ Attach to Form 1040 or Form 1041.

▶ Information about Form 8582 and its instructions is available at www.irs.gov/form8582

OMB No. 1545-1008

2013Attachment
Sequence No. **88**

Name(s) shown on return

Identifying number

BRADLEY S. SCHNEIDER**Part I 2013 Passive Activity Loss** Caution: Complete Worksheets 1, 2, and 3 before completing Part I.**Rental Real Estate Activities With Active Participation** (For the definition of active participation, see**Special Allowance for Rental Real Estate Activities** in the instructions.)

1a Activities with net income (enter the amount from Worksheet 1, column (a))	1a	1,836.	
b Activities with net loss (enter the amount from Worksheet 1, column (b))	1b		
c Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	1c		
d Combine lines 1a, 1b, and 1c	1d	1,836.	
Commercial Revitalization Deductions From Rental Real Estate Activities			
2a Commercial revitalization deductions from Worksheet 2, column (a)	2a		
b Prior year unallowed commercial revitalization deductions from Worksheet 2, column (b)	2b		
c Add lines 2a and 2b	2c		
All Other Passive Activities			
3a Activities with net income (enter the amount from Worksheet 3, column (a))	3a	18,289.	
b Activities with net loss (enter the amount from Worksheet 3, column (b))	3b	-5,524.	
c Prior years unallowed losses (enter the amount from Worksheet 3, column (c))	3c		
d Combine lines 3a, 3b, and 3c	3d	12,765.	
4 Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with your return; all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Report the losses on the forms and schedules normally used	4	14,601.	

- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
 - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
 - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

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

Part II Special Allowance for Rental Real Estate Activities With Active Participation

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

5 Enter the smaller of the loss on line 1d or the loss on line 4	5	
6 Enter \$150,000. If married filing separately, see instructions	6	
7 Enter modified adjusted gross income, but not less than zero (see instructions)	7	
Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.		
8 Subtract line 7 from line 6	8	
9 Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions	9	
10 Enter the smaller of line 5 or line 9	10	

If line 2c is a loss, go to Part III. Otherwise, go to line 15.

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

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

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

Part IV Total Losses Allowed

15 Add the income, if any, on lines 1a and 3a and enter the total	15	
16 Total losses allowed from all passive activities for 2013. Add lines 10, 14, and 15. See instructions to find out how to report the losses on your tax return	16	

ALTERNATIVE MINIMUM TAX

Form 8582 (2013) **BRADLEY S. SCHNEIDER**

Page **2**

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 1					
Total. Enter on Form 8582, lines 1a, 1b, and 1c	1,836.				

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

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 3					
Total. Enter on Form 8582, lines 3a, 3b, and 3c	18,289.	-5,524.			

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

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

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

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
Total				

11

314411 05-01-13

FOOTNOTES

STATEMENT 1

ALLOCATION OF FORM 4868, APPLICATION FOR
AUTOMATIC EXTENSION OF TIME TO FILE U.S.
INDIVIDUAL INCOME TAX RETURN:

BRADLEY S. SCHNEIDER (SSN: [REDACTED])	40,000.
JULIE R. DANN (SSN: [REDACTED])	45,000.
	<hr/>
	85,000.
	<hr/> <hr/>

FORM 1040

PERSONAL EXEMPTION WORKSHEET

STATEMENT

2

1. IS THE AMOUNT ON FORM 1040, LINE 38, MORE THAN THE AMOUNT SHOWN ON LINE 4 BELOW FOR YOUR FILING STATUS?
 NO. STOP. MULTIPLY \$3,900 BY THE TOTAL NUMBER OF EXEMPTIONS CLAIMED ON FORM 1040, LINE 6D, AND ENTER THE RESULT ON LINE 42.
 YES. CONTINUE
2. MULTIPLY \$3,900 BY THE TOTAL NUMBER OF EXEMPTIONS CLAIMED ON FORM 1040, LINE 6D 7,800.
3. ENTER THE AMOUNT FROM FORM 1040, LINE 38 220,216.
4. ENTER THE AMOUNT FOR YOUR FILING STATUS 150,000.
 SINGLE \$250,000
 MARRIED FILING JOINTLY OR WIDOW(ER) \$300,000
 MARRIED FILING SEPARATELY \$150,000
 HEAD OF HOUSEHOLD \$275,000
5. SUBTRACT LINE 4 FROM LINE 3. IF THE RESULT IS MORE THAN \$122,500 (\$61,250 IF MARRIED FILING SEPARATELY), STOP. ENTER -0- ON LINE 42. 70,216.
6. DIVIDE LINE 5 BY \$2,500 (\$1,250 IF MARRIED FILING SEPARATELY). IF THE RESULT IS NOT A WHOLE NUMBER, INCREASE IT TO THE NEXT HIGHER WHOLE NUMBER (FOR EXAMPLE, INCREASE 0.0004 TO 1).
7. MULTIPLY LINE 6 BY 2% (.02) AND ENTER THE RESULT AS A DECIMAL
8. MULTIPLY LINE 2 BY LINE 7
9. SUBTRACT LINE 8 FROM LINE 2. TOTAL TO FORM 1040, LINE 42.

FORM 1040

TAX-EXEMPT INTEREST

STATEMENT

3

NAME OF PAYER

AMOUNT

MESIROW FINANCIAL	11,217.
MESIROW FINANCIAL - TAX-EXEMPT FEES	-1,959.
MESIROW FINANCIAL	132.
NATIONAL FINANCIAL SERVICES LLC	14.
MESIROW FINANCIAL - ACCRUED INTEREST PURCHASED	-1,357.
TOTAL TO FORM 1040, LINE 8B	8,047.

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 4

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T HOUSE OF REP -MEMBERS SERVICES	127,666.	19,869.	6,383.		7,049.	2,185.
TOTALS	127,666.	19,869.	6,383.		7,049.	2,185.

FORM 1040 QUALIFIED DIVIDENDS STATEMENT 5

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
CHARLES SCHWAB & CO., INC.	74.	74.
NATIONAL FINANCIAL SERVICES LLC	2,801.	1,078.
TOTAL INCLUDED IN FORM 1040, LINE 9B		1,152.

SCHEDULE A MISCELLANEOUS DEDUCTIONS SUBJECT TO FLOOR STATEMENT 6

DESCRIPTION	AMOUNT
NATIONAL FINANCIAL SERVICES LLC	667.
MESIROW FINANCIAL	208.
FROM K-1 - MDRJB PARTNERSHIP	771.
FROM K-1 - LEAD-OUT THIRD SOLUTIONS INVESTMENT, LLC	120.
TOTAL TO SCHEDULE A, LINE 23	1,766.

SCHEDULE A STATE AND LOCAL INCOME TAXES STATEMENT 7

DESCRIPTION	AMOUNT
HOUSE OF REP -MEMBERS SERVICES	6,383.
ILLINOIS 2ND QTR ESTIMATE PAYMENTS	1,000.
ILLINOIS PRIOR YEAR BALANCE DUE AND EXTENSION PAYMENTS	8,039.
TOTAL TO SCHEDULE A, LINE 5	15,422.

SCHEDULE A		CASH CONTRIBUTIONS	STATEMENT	8
DESCRIPTION	AMOUNT 50% LIMIT	AMOUNT 30% LIMIT		
MISCELLANEOUS	24,084.			
MISCELLANEOUS		3,950.		
FROM K-1 - MDRJB PARTNERSHIP	1.			
SUBTOTALS	24,085.	3,950.		
TOTAL TO SCHEDULE A, LINE 16		28,035.		

SCHEDULE A	ITEMIZED DEDUCTIONS WORKSHEET	STATEMENT	9
1.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 9, 15, 19, 20, 27, AND 28	57,327.	
2.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 14, AND 20, PLUS ANY GAMBLING AND CASUALTY OR THEFT LOSSES INCLUDED ON LINE 28.	0.	
3.	IS THE AMOUNT ON LINE 2 LESS THAN THE AMOUNT ON LINE 1? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 2 FROM LINE 1	57,327.	
4.	MULTIPLY LINE 3 BY 80% (.80).	45,862.	
5.	ENTER THE AMOUNT FROM FORM 1040, LINE 38.	220,216.	
6.	ENTER \$300,000 IF MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$275,000 IF HEAD OF HOUSEHOLD; \$250,000 IF SINGLE; OR \$150,000 IF MARRIED FILING SEPARATELY	150,000.	
7.	IS THE AMOUNT ON LINE 6 LESS THAN THE AMOUNT ON LINE 5? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 6 FROM LINE 5	70,216.	
8.	MULTIPLY LINE 7 BY 3% (.03)	2,106.	
9.	ENTER THE SMALLER OF LINE 4 OR LINE 8	2,106.	
10.	TOTAL ITEMIZED DEDUCTIONS. SUBTRACT LINE 9 FROM LINE 1. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 29	55,221.	

SCHEDULE B	TAX-EXEMPT INTEREST FROM 1099-DIV	STATEMENT	10
NAME OF PAYER		AMOUNT	
MESIROW FINANCIAL		263.	
NATIONAL FINANCIAL SERVICES LLC		28.	
TOTAL TAX-EXEMPT INTEREST FROM 1099-DIV TO SCHEDULE B, LINE 5		291.	

SCHEDULE D	SHORT-TERM CAPITAL GAINS AND LOSSES	STATEMENT	11
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DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
NFS - SEE ATTACHED	VARIOUS		15,586.	15,875.	-289.
MESIROW FINANCIAL -	VARIOUS				
SEE ATTACHED			1,264.	1,267.	-3.
TOTAL TO SCH D, LINE 1A			16,850.	17,142.	-292.

SCHEDULE D	LONG-TERM CAPITAL GAINS AND LOSSES	STATEMENT	12
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DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	COST OR OTHER BASIS	GAIN OR LOSS
NFS - SEE ATTACHED	VARIOUS		6,837.	6,641.	196.
MESIROW FINANCIAL -	VARIOUS				
SEE ATTACHED			489.	489.	0.
TOTAL TO SCH D, LINE 8A			7,326.	7,130.	196.

SCHEDULE D	NET LONG-TERM GAIN OR LOSS FROM FORMS 4797, 2439, 6252, 4684, 6781 AND 8824	STATEMENT	13
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DESCRIPTION OF PROPERTY	GAIN OR LOSS	28% GAIN
FORM 4797	18,289.	
TOTAL TO SCHEDULE D, PART II, LINE 11	18,289.	

SCHEDULE D	NET LONG-TERM GAIN OR LOSS FROM PARTNERSHIPS, S CORPORATIONS, AND FIDUCIARIES	STATEMENT	14
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DESCRIPTION OF ACTIVITY	GAIN OR LOSS	28% GAIN
AERODIRECT FUND II, LLC	-9.	
TOTAL TO SCHEDULE D, PART II, LINE 12	-9.	

SCHEDULE D	CAPITAL GAIN DISTRIBUTIONS	STATEMENT 15
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NAME OF PAYER	TOTAL CAPITAL GAIN	28% GAIN
MESIROW FINANCIAL	63.	
NATIONAL FINANCIAL SERVICES LLC	1,087.	
TOTALS TO SCHEDULE D, LINE 13	1,150.	

SCHEDULE D	UNRECAPTURED SECTION 1250 GAIN	STATEMENT 16
1. IF YOU HAVE A SECTION 1250 PROPERTY IN PART III OF FORM 4797 FOR WHICH YOU MADE AN ENTRY IN PART I OF FORM 4797, ENTER THE SMALLER OF LINE 22 OR LINE 24 OF FORM 4797 FOR THAT PROPERTY. IF YOU DID NOT HAVE ANY SUCH PROPERTY, GO TO LINE 4		
2. ENTER THE AMOUNT FROM FORM 4797, LINE 26G, FOR THE PROPERTY FOR WHICH YOU MADE AN ENTRY ON LINE 1		
3. SUBTRACT LINE 2 FROM LINE 1		
4. ENTER THE TOTAL UNRECAPTURED SECTION 1250 GAIN INCLUDED ON LINE 26 OR LINE 37 OF FORM(S) 6252 FROM INSTALLMENT SALES OF TRADE OR BUSINESS PROPERTY HELD MORE THAN 1 YEAR . .		
5. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1 FROM A PARTNERSHIP OR AN S CORPORATION AS "UNRECAPTURED SECTION 1250 GAIN"		6,429.
6. ADD LINES 3 THROUGH 5		6,429.
7. ENTER THE SMALLER OF LINE 6 OR THE GAIN FROM FORM 4797, LINE 7	6,429.	
8. ENTER THE AMOUNT, IF ANY, FROM FORM 4797, LINE 8		
9. SUBTRACT LINE 8 FROM LINE 7. IF ZERO OR LESS, ENTER -0- . . .		6,429.
10. ENTER THE AMOUNT OF ANY GAIN FROM THE SALE OR EXCHANGE OF AN INTEREST IN A PARTNERSHIP ATTRIBUTABLE TO UNRECAPTURED SECTION 1250 GAIN		
11. ENTER THE TOTAL OF ANY AMOUNTS REPORTED TO YOU ON A SCHEDULE K-1, FORMS 1099-DIV, OR FORM 2439 AS "UNRECAPTURED SECTION 1250 GAIN" FROM AN ESTATE, TRUST, REAL ESTATE INVESTMENT TRUST, OR MUTUAL FUND (OR OTHER REGULATED INVESTMENT COMPANY)		
12. ENTER THE TOTAL OF ANY UNRECAPTURED SECTION 1250 GAIN FROM SALES (INCLUDING INSTALLMENT SALES) OR OTHER DISPOSITIONS OF SECTION 1250 PROPERTY HELD MORE THAN 1 YEAR FOR WHICH YOU DID NOT MAKE AN ENTRY IN PART I OF FORM 4797 FOR THE YEAR OF SALE . .		
13. ADD LINES 9 THROUGH 12		6,429.
14. IF YOU HAD ANY SECTION 1202 GAIN OR COLLECTIBLE GAIN OR (LOSS), ENTER THE TOTAL OF LINES 1 THROUGH 4 OF THE 28% RATE GAIN WORKSHEET		
15. ENTER THE (LOSS), IF ANY, FROM SCH D, LINE 7. IF SCH D, LINE 7, IS ZERO OR A GAIN ENTER -0-	-1,278.	
16. ENTER YOUR LONG-TERM CAPITAL LOSS CARRYOVERS FROM SCHEDULE D, LINE 14, AND SCHEDULE K-1 (FORM 1041), BOX 11, CODE C		
17. COMBINE LINES 14 THROUGH 16. IF THE RESULT IS A (LOSS), ENTER IT AS A POSITIVE AMOUNT. IF THE RESULT IS ZERO OR A GAIN, ENTER -0-		1,278.
18. SUBTRACT LINE 17 FROM LINE 13. IF ZERO OR LESS, ENTER -0-. IF MORE THAN ZERO, ENTER THE RESULT HERE AND ON SCHEDULE D, LINE 19		5,151.

FORM 6251

PASSIVE ACTIVITIES

STATEMENT 17

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
MDRJB PARTNERSHIP	FORM 4797	18,289.	18,289.	
MDRJB PARTNERSHIP	SCH E	-5,255.	-5,054.	-201.
AERODIRECT FUND III, LLC	SCH E	-269.	-269.	
RESIDENTIAL RESIDENCE - [REDACTED] [REDACTED]	SCH E	1,836.	1,836.	
TOTAL TO FORM 6251, LINE 19				-201.



FORM 6251	EXEMPTION WORKSHEET	STATEMENT 18
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1	ENTER: \$51,900 IF SINGLE OR HEAD OF HOUSEHOLD; \$80,800 IF MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$40,400 IF MARRIED FILING SEPARATELY.	40,400.
2	ENTER YOUR ALTERNATIVE MINIMUM TAXABLE INCOME (AMTI) FORM 6251, LINE 28	190,274.
3	ENTER: \$115,400 IF SINGLE OR HEAD OF HOUSEHOLD; \$153,900 IF MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$76,950 IF MARRIED FILING SEPARATELY	76,950.
4	SUBTRACT LINE 3 FROM LINE 2. IF ZERO OR LESS ENTER -0-	113,324.
5	MULTIPLY LINE 4 BY 25% (.25).	28,331.
6	SUBTRACT LINE 5 FROM LINE 1. IF ZERO OR LESS, ENTER -0-. IF ANY OF THE THREE CONDITIONS UNDER CERTAIN CHILDREN UNDER AGE 24 APPLY TO YOU, COMPLETE LINES 7 THROUGH 10. OTHERWISE, STOP HERE AND ENTER THIS AMOUNT ON FORM 6251, LINE 29, AND GO TO FORM 6251, LINE 30	12,069.
7	MINIMUM EXEMPTION AMOUNT FOR CERTAIN CHILDREN UNDER AGE 24. .	
8	ENTER YOUR EARNED INCOME, IF ANY.	
9	ADD LINES 7 AND 8	
10	ENTER THE SMALLER OF LINE 6 OR LINE 9 HERE AND ON FORM 6251, LINE 29, AND GO TO FORM 6251, LINE 30	

FORM 6251	INTEREST FROM SPECIFIED PRIVATE ACTIVITY BONDS	STATEMENT 19
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DESCRIPTION	AMOUNT
NATIONAL FINANCIAL SERVICES LLC	14.
TOTAL TO FORM 6251, LINE 12	14.



FORM 6251

LINE 49 WORKSHEET

STATEMENT 20

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

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

3 ENTER THE AMOUNT FROM LINE 7 OF THE QUALIFIED DIVIDENDS
 AND CAPITAL GAIN TAX WORKSHEET IN THE INSTRUCTIONS FOR
 FORM 1040, LINE 44, OR THE AMOUNT FROM LINE 19 OF THE
 SCHEDULE D TAX WORKSHEET, WHICHEVER APPLIES (AS FIGURED
 FOR REGULAR TAX). IF YOU DID NOT COMPLETE EITHER
 WORKSHEET FOR THE REGULAR TAX, ENTER THE AMOUNT FROM FORM
 1040, LINE 43; BUT DO NOT ENTER LESS THAN -0-. IF YOU DID
 NOT COMPLETE EITHER WORKSHEET FOR THE REGULAR TAX AND YOU
 ARE FILING FORM 2555 OR FORM 2555-EZ, ENTER THE AMOUNT
 FROM LINE 3 OF THE FOREIGN EARNED INCOME TAX WORKSHEET IN
 THE FORM 1040 INSTRUCTIONS (AS FIGURED FOR THE REGULAR
 TAX) 140,687.

4 ADD LINE 2 AND LINE 3 140,687.

5 SUBTRACT LINE 4 FROM LINE 1 AND ENTER THE RESULT HERE AND ON
 LINE 49, BUT DO NOT ENTER LESS THAN -0- 84,313.

FORM 8960

 MISCELLANEOUS ITEMIZED DEDUCTIONS PROPERLY
 ALLOCABLE TO INVESTMENT INCOME BEFORE LIMITATIONS

STATEMENT 21

DESCRIPTION	LINE	AMOUNT
NATIONAL FINANCIAL SERVICES LLC	9C	667.
MESIROW FINANCIAL	9C	208.
FROM K-1 - MDRJB PARTNERSHIP	9C	771.
FROM K-1 - LEAD-OUT THIRD SOLUTIONS INVESTMENT, LL	9C	120.
TOTAL TO LINES 9 AND 10 WORKSHEET, PART I, LINE 1		1,766.

FORM 8582 ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1 STATEMENT 22

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
RESIDENTIAL RESIDENCE - [REDACTED]	1,836.	0.		1,836.	
TOTALS	1,836.	0.		1,836.	

FORM 8582 OTHER PASSIVE ACTIVITIES - WORKSHEET 3 STATEMENT 23

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
MDRJB PARTNERSHIP	18,289.	-5,054.		13,235.	
AERODIRECT FUND III, LLC	0.	-269.			-269.
TOTALS	18,289.	-5,323.		13,235.	-269.

FORM 8582 SUMMARY OF PASSIVE ACTIVITIES STATEMENT 24

NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
MDRJB PARTNERSHIP	FORM 4797	18,289.		18,289.		
MDRJB PARTNERSHIP	SCH E	-5,054.		-5,054.		5,054.
AERODIRECT FUND III, LLC	SCH E	-269.		-269.		269.
X RESIDENTIAL RESIDENCE - [REDACTED]	SCH E	1,836.		1,836.		
TOTALS		14,802.		14,802.		5,323.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME						
TOTAL						5,323.

FORM 8582-CR

OTHER PASSIVE ACTIVITY CREDITS
WORKSHEET 4

STATEMENT 25

NAME OF ACTIVITY	FROM FORM	CURRENT YEAR CREDITS	PRIOR YEAR UNALLOWED CREDITS	TOTAL CREDITS
MDRJB PARTNERSHIP	6765/3800, LINE 2	11.		11.
TOTALS		11.		11.

FORM 8582

ALTERNATIVE MINIMUM TAX
ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1

STATEMENT 26

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
RESIDENTIAL RESIDENCE - [REDACTED]	1,836.	0.		1,836.	
TOTALS	1,836.	0.		1,836.	

FORM 8582

ALTERNATIVE MINIMUM TAX
OTHER PASSIVE ACTIVITIES - WORKSHEET 3

STATEMENT 27

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
MDRJB PARTNERSHIP	18,289.	-5,255.		13,034.	
AERODIRECT FUND III, LLC	0.	-269.			-269.
TOTALS	18,289.	-5,524.		13,034.	-269.

FORM 8582AMT

SUMMARY OF PASSIVE ACTIVITIES - AMT

STATEMENT 28

NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
MDRJB PARTNERSHIP	FORM 4797	18,289.		18,289.		
MDRJB PARTNERSHIP	SCH E	-5,255.		-5,255.		5,255.
AERODIRECT FUND III, LLC	SCH E	-269.		-269.		269.
X RESIDENTIAL RESIDENCE - [REDACTED]	SCH E	1,836.		1,836.		
TOTALS		14,601.		14,601.		5,524.
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME						
TOTAL						5,524.

Illinois Department of Revenue

	-		-	
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Submission ID

2013 IL-8453 Illinois Individual Income Tax Electronic Filing Declaration

(Do not mail Form IL-8453 to the Illinois Department of Revenue unless it is requested for review.)

Step 1: Provide taxpayer information

Print or type	BRADLEY S. SCHNEIDER			
	First name and middle initial	Spouse's first name (and last name if different)	Last name	Social Security number
	Mailing address			Spouse's Social Security number
		IL		
	City	State	ZIP	Daytime phone number

Step 2: Complete information from tax return

1	Net income from Form IL-1040, Line 11, or Schedule NR, Step 5, Line 51	1	<u>224,063.00</u>
2	Tax from Form IL-1040, Line 13	2	<u>11,203.00</u>
3	Illinois Income Tax withheld from Form IL-1040, Line 25 only (write "0" if none)	3	<u>6,383.00</u>
4	Overpayment from Form IL-1040, Line 35	4	<u>2,511.00</u>
5	Total amount due from Form IL-1040, Line 39	5	<u>00</u>
6	Filing status: Single/head of household Married filing jointly <input checked="" type="checkbox"/> Married filing separately Widowed		

Step 3: Complete direct deposit of refund or electronic funds withdrawal information (Optional)

To initiate a payment or refund transaction, the information in this Step must be included within the electronic transmission. Illinois does not support international ACH transactions. IDOR will only perform direct transactions (i.e., debit, deposit) with financial institutions located within the United States or those not funded by international funds. Electronic payments will not be accepted and refunds will be via paper check.

7 Routing no. (RN): _____
8 Account no. (AN): _____
9 Type of account: ☐ Checking ☐ Savings
10 Date the payment is to be electronically withdrawn: _____
11 Electronic funds withdrawal amount: _____, 00
12 Name on account: _____

Step 4: Taxpayer declaration and signature (Sign only after completing Step 2 and, if applicable, Step 3.)

☐ I consent that my refund may be directly deposited as designated in Step 3 and declare the information on Lines 7 through 9 is correct. If I have filed a joint return, this is an irrevocable appointment of the other spouse as an agent to receive the refund.

☐ I authorize the Illinois Department of Revenue (IDOR) and its designated financial agent to initiate an ACH electronic funds withdrawal as designated in the electronic portion of my 2013 Illinois Individual Income Tax return. I authorize the financial institutions involved in the processing of an electronic overpayment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

☒ I do not want direct deposit of my refund, or an electronic funds withdrawal (direct debit) of my balance due.

Under penalties of perjury, I declare the information on my electronic Form IL-1040 and the information I provided to my electronic return originator (ERO) are identical. To the best of my knowledge, my return is true, correct, and complete. I consent that my return, this declaration, and accompanying information may be sent to IDOR by my ERO. I authorize IDOR to inform my ERO and/or the transmitter when my return has been accepted or rejected. If rejected, I authorize IDOR to identify the reason(s) so the return may be corrected and retransmitted if possible.

Sign ***** THIS IS NOT A FILEABLE COPY *****

here Your signature _____ Date _____ Spouse's signature (if joint return, **both** must sign) _____ Date _____

Step 5: Electronic return originator (ERO) and paid preparer declaration and signature

I declare that I have examined this taxpayer's electronic Form IL-1040, the information on this Form IL-8453, and accompanying information. I have followed all requirements of this program and declare, under penalties of perjury, that to the best of my knowledge the taxpayer's return and accompanying information are true, correct, and complete.

ERO use only	TERI NEWMAN	08/12/14	Check if paid preparer: <input checked="" type="checkbox"/> (See instructions.)
	ERO's signature	Date	
	PLANTE & MORAN, PLLC		
	Firm's name or your name if self-employed		Your Social Security number (SSN) or PTIN
	10 S. RIVERSIDE PLAZA, 9TH FLOOR		38-1357951
	Mailing address		Federal employer identification no. (FEIN)
	CHICAGO, IL 60606		(312) 207-1040
	City	State	ZIP
			Phone number

Step 6: Attach required documents (e.g., W-2 forms, 1099 forms, IL-1310). Do not mail Form IL-8453 and these documents unless requested for review.

Illinois Department of Revenue

2013 Form IL-1040

Individual Income Tax Return or for fiscal year ending _____

Over 80% of taxpayers file electronically. It is easy and you will get your refund faster. Visit tax.illinois.gov.

Do not write above this line.

Step 1: Personal Information

BRADLEY S. SCHNEIDER

JULIE R. DANN

C Filing status (see instructions)

☐ Single or head of household

☐ Married filing jointly

☒ Married filing separately

☐ Widowed

D Check if you are in a civil union (see instructions). ☐

Step 2:

Income

1 Federal adjusted gross income from your U.S. 1040, Line 37; U.S. 1040A, Line 21; or (Whole dollars only)
U.S. 1040EZ, Line 4. **1** 220,216 .00

2 Federally tax-exempt interest and dividend income from your U.S. 1040 or 1040A, Line 8b;
or U.S. 1040EZ. **2** 8,047 .00

3 Other additions. **Attach** Schedule M. **3** .00

4 **Total income.** Add Lines 1 through 3. **4** 228,263 .00

Step 3:

Base

Income

5 Social Security benefits and certain retirement plan income
received if included in Line 1. **Attach** Page 1 of federal return. **5** .00

6 Illinois Income Tax overpayment included in U.S. 1040, Line 10. **6** .00

7 Other subtractions. **Attach** Schedule M. **7** .00

Check if Line 7 includes any amount from Schedule 1299-C. ☐

8 Add Lines 5, 6, and 7. This is the total of your subtractions. **8** .00

9 **Illinois base income.** Subtract Line 8 from Line 4. **9** 228,263 .00

Step 4:

Exemptions

10 **a** Number of exemptions from your federal return. 2 x \$2,100 **a** 4,200 .00

b If someone can claim you as a dependent, see instructions. x \$2,100 **b** .00

c Check if 65 or older: ☐ You + ☐ Spouse = x \$1,000 **c** .00

d Check if legally blind: ☐ You + ☐ Spouse = x \$1,000 **d** .00

Exemption allowance. Add Lines a through d. **10** 4,200 .00

Step 5:

Net

Income

11 **Residents: Net income.** Subtract Line 10 from Line 9. **Skip** Line 12. **11** 224,063 .00

12 **Nonresidents and part-year residents:**
Check the box that applies to you during 2013 ☐ Nonresident ☐ Part-year resident, and
write the **Illinois base income** from Sch. NR. **Attach** Sch. NR. **12** .00

Step 6:

Tax

13 **Residents:** Multiply Line 11 by 5% (.05). Cannot be less than zero. **13** 11,203 .00

Nonresidents and part-year residents: Write the tax from Schedule NR. **14** .00

14 Recapture of investment tax credits. **Attach** Schedule 4255. **14** .00

15 **Income tax.** Add Lines 13 and 14. Cannot be less than zero. **15** 11,203 .00

Step 7:

Tax After

Non-

refundable

Credits

16 Income tax paid to another state while an Illinois resident.
Attach Schedule CR. **16** .00

17 Property tax and K-12 education expense credit amount from
Schedule ICR. **Attach** Schedule ICR. **17** 608 .00

18 Credit amount from Schedule 1299-C. **Attach** Schedule 1299-C. **18** .00

19 Add Lines 16, 17, and 18. This is the total of your credits.
Cannot exceed the tax amount on Line 15. **19** 608 .00

20 **Tax after nonrefundable credits.** Subtract Line 19 from Line 15. **20** 10,595 .00

Staple W-2 and 1099 forms here

Staple your check and IL-1040-V



	21 Tax after nonrefundable credits from Page 1, Line 20.	21	10,595 .00
<hr/>			
Step 8:	22 Household employment tax. See instructions.	22	2,327 .00
Other	23 Use tax on internet, mail order, or other out-of-state purchases from	23	0 .00
Taxes	UT Worksheet or UT Table in the instructions. Do not leave blank.	23	0 .00
	24 Total Tax. Add Lines 21, 22, and 23.	24	12,922 .00
<hr/>			
Step 9:	25 Illinois Income Tax withheld. Attach all W-2 and 1099 forms.	25	6,383 .00
Payments	26 Estimated payments from Forms IL-1040-ES and IL-505-I,	26	9,050 .00
and	including overpayment applied from 2012 return.	26	9,050 .00
Refundable	27 Pass-through entity tax payments. Attach Schedule K-1-P or K-1-T.	27	.00
Credit	28 Earned Income Credit from Schedule ICR. Attach Schedule ICR.	28	.00
	29 Total payments and refundable credit. Add Lines 25 through 28.	29	15,433 .00
<hr/>			
Step 10:	30 Overpayment. If Line 29 is greater than Line 24, subtract Line 24 from Line 29.	30	2,511 .00
Result	31 Underpayment. If Line 24 is greater than Line 29, subtract Line 29 from Line 24.	31	.00
<hr/>			
Step 11:	32 Late-payment penalty for underpayment of estimated tax.	32	.00
Underpayment	a Check if at least two-thirds of your federal gross income is from farming. <input type="checkbox"/>		
of Estimated	b Check if you or your spouse are 65 or older and permanently		
Tax Penalty	living in a nursing home. <input type="checkbox"/>		
and Donations	c Check if your income was not received evenly during the year and you		
	annualized your income on Form IL-2210. Attach Form IL-2210. <input type="checkbox"/>		
	d Check if you were not required to file an Illinois Individual Income Tax		
	return in the previous tax year. <input type="checkbox"/>		
	33 Voluntary charitable donations. Attach Schedule G.	33	.00
	34 Total penalty and donations. Add Lines 32 and 33.	34	.00
<hr/>			
Step 12:	35 If you have an overpayment on Line 30 and this amount is greater than	35	2,511 .00
Refund or	Line 34, subtract Line 34 from Line 30. This is your remaining overpayment .	35	2,511 .00
Amount You	36 Amount from Line 35 you want refunded to you . Check one box on Line 37. See instructions.	36	0 .00
Owe	37 I choose to receive my refund by		
	<input type="checkbox"/> direct deposit - Complete the information below if you check this box.		
	Routing number <input type="text"/> <input type="checkbox"/> Checking or <input type="checkbox"/> Savings Account number <input type="text"/>		
	<input type="checkbox"/> Illinois Individual Income Tax refund debit card		
	<input type="checkbox"/> paper check		
	38 Subtract Line 36 from Line 35. This amount will be applied to your 2014 estimated tax .	38	2,511 .00
	39 If you have an underpayment on Line 31, add Lines 31 and 34. or		
	If you have an overpayment on Line 30 and this amount is less than Line 34,		
	subtract Line 30 from Line 34. This is the amount you owe .	39	.00
<hr/>			
Step 13:	Under penalties of perjury, I state that I have examined this return, and, to the best of my knowledge, it is true, correct, and complete.		
Sign and			
Date	Your signature <u>TERI NEWMAN</u> Date <u>08/12/14</u> Daytime phone number <u>(312) 207-1040</u> Your spouse's signature <u>[REDACTED]</u> Date _____		
	Paid preparer's signature _____ Date _____ Preparer's phone number _____ Preparer's FEIN, SSN, or PTIN _____		
Third Party	<input checked="" type="checkbox"/> Check, and complete below, to allow another person to discuss this return with the Illinois Department of Revenue.		
Designee	<u>TERI NEWMAN</u> <u>(312) 207-1040</u> Designee's name (please print) Designee's phone number		
Form 1099-G	<input type="checkbox"/> We no longer automatically mail 1099-G forms. Instead, we ask that you get this information from our website.		
Information	Check the box to receive a paper Form 1099-G next year, if you meet the criteria requiring us to issue a Form 1099-G.		

349002 06-24-14

☐ If no payment enclosed, mail to:
ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62719-0001

☐ If payment enclosed, mail to:
ILLINOIS DEPARTMENT OF REVENUE
SPRINGFIELD IL 62726-0001

ID: 2BX

IL-1040 page 2 (R-12/13)

DR _____ AP _____ RR _____ DC _____ IR _____



Illinois Department of Revenue
2013 Schedule ICR Illinois Credits
Attach to your Form IL-1040

IL Attachment No. 23

Read this information first

Complete this schedule only if you are eligible for the

- Illinois Property Tax Credit
- K-12 Education Expense Credit
- Earned Income Credit (EIC)

- You must complete Form IL-1040 through Line 15 and Schedule CR, if applicable, before completing this schedule.
- The total amount of Illinois Property Tax Credit and K-12 Education Expense Credit cannot exceed tax. Only the Earned Income Credit may exceed tax.

Step 1: Provide the following information

BRADLEY S. SCHNEIDER

Your name as shown on your Form IL-1040

[REDACTED]
Your Social Security number

Step 2: Figure your nonrefundable credit

- | | | |
|--|---|-------------------|
| 1 Write the amount of tax from your Form IL-1040, Line 15. | 1 | <u>11,203 .00</u> |
| 2 Write the amount of credit for tax paid to other states from your Form IL-1040, Line 16. | 2 | <u>.00</u> |
| 3 Subtract Line 2 from Line 1. | 3 | <u>11,203 .00</u> |

Section A - Illinois Property Tax Credit (See instructions for directions on how to obtain your property number)

- 4 a Write the total amount of Illinois Property Tax paid during the tax year for the real estate that includes your principal residence. 4a 12,150 .00
- b Write the county and property number for the property listed above.
4b [REDACTED] County [REDACTED] Property number
- c Write the county and property number for an adjoining lot, if included in Line 4a.
4c [REDACTED] County [REDACTED] Property number
- d Write the county and property number for another adjoining lot, if included in Line 4a.
4d [REDACTED] County [REDACTED] Property number
- e Write the portion of your tax bill that is deductible as a business expense on U.S. income tax forms or schedules, even if you did not take the federal deduction. 4e .00
- f Subtract Line 4e from Line 4a. 4f 12,150 .00
- g Multiply Line 4f by 5% (.05). 4g 608 .00
- 5 Compare Lines 3 and 4g, and write the lesser amount here. 5 608 .00
- 6 Subtract Line 5 from Line 3. 6 10,595 .00

Section B - K-12 Education Expense Credit

Note You must complete the *K-12 Education Expense Credit Worksheet* on page 2 of this schedule and **attach** any receipt you received from your student's school.

- 7 a Write the total amount of K-12 education expenses from Line 13 of the worksheet on page 2 of this schedule. 7a .00
- b You may not take a credit for the first \$250 paid. 7b 250.00
- c Subtract Line 7b from Line 7a. If the result is negative, enter "zero." 7c .00
- d Multiply Line 7c by 25% (.25). Compare the result and \$500, and write the lesser amount here. 7d .00
- 8 Compare Lines 6 and 7d, and write the lesser amount here. 8 0 .00

Section C - Total Nonrefundable Credit

- 9 Add Lines 5 and 8. This is your nonrefundable credit amount. Write this amount on Form IL-1040, Line 17. → 9 608 .00

Continued on Page 2 →



Schedule ICR - Page 2

Step 3: Figure your refundable credit

Earned Income Credit

Note If you were in a civil union as of December 31, 2013, you must recompute the federal EIC on your "as-if-married" federal return before computing this step.

10 a

Write the amount of federal EIC as shown on your U.S. 1040, Line 64a; U.S. 1040A, Line 38a; or U.S. 1040EZ, Line 8a.

10a

.00

10 b

Multiply the amount on Line 10a by 10% (.10).

10b

.00

10 c

Illinois residents: Write 1.0.
Nonresidents and part-year residents: Write the decimal from Schedule NR, Line 48.

10c

10 d

Multiply Line 10b by the decimal on Line 10c.

10d

.00

11

Write the amount from Line 10d here. This is your Illinois Earned Income Credit. Write this amount on Form IL-1040, Line 28.

→

11

.00

Section B Continued - K-12 Education Expense Credit Worksheet (continued from Step 2, Section B)

Note You must complete this section and attach any receipt you received from your student's school.

12 Complete the following information for each of your qualifying students. If a student attended more than one qualifying school during the calendar year, please list separately. If you need more space, attach a separate piece of paper following this format.

A	B	C	D	E	F
Student's name	Social Security number	Grade (K-12 only)	School name (IL K-12 schools only or write "home school," if applicable)	School city (IL cities only)	Total tuition, book/lab fees
a					
b					
c					
d					
e					
f					
g					
h					
i					
j					

13

Add the amounts in Column F for Lines 12a through 12j (and the amounts from Column F of any additional pages you attached). This is the total amount of your qualified education expenses for this year. Write this amount here and on Step 2, Line 7a of this schedule.

→

13

.00

2013 IL-2210 Computation of Penalties for Individuals

Attach to your Form IL-1040

IL Attachment No. 19

Read this information first-We encourage you to **let us figure your penalties** and send you a bill instead of completing this form yourself.

We will waive the late payment penalty for underpayment of estimated tax if you timely paid the lesser of 100 percent of the prior year's tax liability or 90 percent of the current year's tax liability. If you elect to complete Form IL-2210, this form reflects that waiver.

The late-payment penalty for underpayment of estimated tax is based on the tax shown due on your original return. Do not use the tax shown on an amended return filed after the extended due date of the return to compute your required installments in Step 2.

Step 1: Provide the following information**BRADLEY S. SCHNEIDER**

Your name as shown on Form IL-1040

Your Social Security number

Note: If your prior year tax return was filed using a different Social Security number than the number above, write that number here.**Step 2: Figure your required installments**

	A This year	B Last year
1 Write the amount of your total income tax from each tax return. See instructions.	1 11,203.	2,843.
2 Write the amount of credits from each tax return. See instructions.	2 608.	574.
3 Subtract Line 2 from Line 1.	3 10,595.	2,269.
4a Write the total amount of this year's Illinois withholding from your W-2 forms.	4a 6,383.	
4b Write the total amount of any pass-through entity payments made on your behalf.	4b	
4c Add Lines 4a and 4b and write the result here.	4c 6,383.	
5 Subtract Line 4c from Line 3.	5 4,212.	
6 Multiply Column A, Line 3, by 90% (.9).	6 9,536.	
7 If Line 5 is \$500 or less or if you are not required to make estimated tax payments, write "0," and go to Step 3. Otherwise, write the lesser of Column A, Line 6, or Column B, Line 3.	7 2,269.	
8 Divide the amount written on Line 7 by four. This is the amount of each required installment. (If you use the annualized income installment method, see instructions.)	8 567.	

	Quarter 1 15th day of 4th month of tax year	Quarter 2 15th day of 6th month of tax year	Quarter 3 15th day of 9th month of tax year	Quarter 4 15th day of 1st mo. after end of tax year
9a Write the installment due date for each quarter. See instructions.				
9b Write the required installment. See instructions.	567.	567.	567.	568.
10a Write any credit carried forward from the prior year.		Skip this line for Quarter 2.	Skip this line for Quarter 3.	Skip this line for Quarter 4.
10b Write the amount of tax withheld.	1,596.	1,596.	1,596.	1,595.
10c Write the amount of pass-through payments.				
10d Add Lines 10a through 10c in each column.	1,596.	1,596.	1,596.	1,595.
11 Subtract Line 10d from Line 9b. If the amount is negative, use brackets.	<1,029.>	<1,029.>	<1,029.>	<1,027.>
12 If the amount on Line 13 of the previous quarter is negative, write that amount as a positive here. Otherwise, write "0."	Skip this line for Quarter 1.			
13 Subtract Line 12 from Line 11. If the amount is negative, use brackets.				

Continue with Step 3 on Page 2 →



Step 3: Figure your unpaid tax



14 Write the amount from Column A, Line 3.

15 Write the amount of household employment tax from IL-1040, Line 22.

16 Write the amount of use tax from IL-1040, Line 23.

17 Add Lines 14 through 16. Write the total amount here.

18 Write the total amount of all payments made on or before the original due date of your tax return. Include any credit carried forward from the prior year, your total estimated payments made this year, Form IL-505-1 payments, the pass-through entity payments made on your behalf, and your withholding as shown on your W-2 forms. Compare that total to the total of Line 9b, Quarters 1 through 4, and write the **greater** amount here.

19 Subtract Line 18 from Line 17. If the amount is

- **positive**, write that amount here. Write this amount in Penalty Worksheet 2, Line 23, Column C and continue to Step 4.
- **zero or negative**, write that amount here and, if negative, use brackets.

14

15

16

17

18

19

10,595.

2,327.

12,922.

15,433.

<2,511.>

Step 4: Figure your late-payment penalty

Use Penalty Worksheet 1 to figure your late-payment penalty for underpayment of estimated tax.
Use Penalty Worksheet 2 to figure your late-payment penalty for unpaid tax.

Note You **must** follow the instructions in order to properly complete the penalty worksheets.

20 Write the amount and the date of each payment you made. See instructions.

Amount	Date paid	Amount	Date paid	Amount	Date paid
a		e		i	
b		f		j	
c		g		k	
d		h		l	

Penalty rates	Number of days late	Penalty rate
	1 - 30	.02
	31 or more	.10

Penalty Worksheet 1 - Late-payment penalty for underpayment of estimated tax

Note If you paid the required amount from Line 13 by the payment due date for each quarter, **do not** complete this worksheet.

21 Write the unpaid amounts from Line 13, Quarters 1 through 4, on the first line of the appropriate quarters in Column C below.

A	B	C	D	E	F	G	H	I
Period	Due date	Unpaid amount	Payment applied	Balance due (Col. C - Col. D)	Payment date	Number of days late	Penalty rate (See above)	Penalty
Qtr 1								
Qtr 2								
Qtr 3								
Qtr 4								

22 Add Column I, Quarters 1 through 4. This is your **late-payment penalty for underpayment of estimated tax**.

Write the total amount here and on your Form IL-1040, Line 32 (round to whole dollars).

22

Note You may apply any remaining overpayment from Quarter 4, Column E above to any underpayment when figuring Penalty Worksheet 2, only if the payment date in Column F is after the original due date of the return.

Penalty Worksheet 2 - Late-payment penalty for unpaid tax

23 Write any positive amount from Line 19 on the first line of Column C below.

A Return	B Due date	C Unpaid amount	D Payment applied	E Balance due (Col. C - Col. D)	F Payment date	G Number of days late	H Penalty rate (See above)	I Penalty

24 Add Column I. This is your **late-payment penalty for unpaid tax**.

Write the total amount here and on Line 33.

24 _____

Step 5: Figure your late-filing penalty and the amount you owe

Note Figure your late-filing penalty only if

- you are filing your tax return after your extended due date, and
- your tax was not paid on or before your original due date.

Figure your late-filing penalty.

25 Write the amount from Form IL-1040, Line 15.	25 _____
26 Write the amount of household employment tax from Form IL-1040, Line 22.	26 _____
27 Write the amount of use tax from Form IL-1040, Line 23.	27 _____
28 Add Lines 25 through 27. Write the total amount here.	28 _____
29 Write the total amount of credits and payments made on or before your original due date.	29 _____
30 Subtract Line 29 from Line 28.	30 _____
31 Multiply the amount on Line 30 by 2% (.02).	31 _____
32 Write the lesser of Line 31 or \$250. This is your late-filing penalty .	32 _____

Figure the amount you owe.

33 Write any late-payment penalty for unpaid tax from Line 24.	33 _____
34 Write any late-filing penalty from Line 32.	34 _____
35 If you have an overpayment on Form IL-1040, Line 35, write that amount as a <negative number>. If you have an amount due on Form IL-1040, Line 39, write that amount as a positive number.	35 _____
36 Add Lines 33 through 35. If the result is a negative number, this is the amount you are overpaid (before any amount applied to next year's estimated tax). If the result is a positive number, this is the amount you owe. See Form IL-1040, Line 39, instructions for your payment options.	36 _____

Continue to Step 6 on Page 4, if annualizing your income. ➡



Step 6: Complete the annualization worksheet for Step 2, Line 9b

Complete this worksheet **only** if your income was not received evenly throughout the year and you choose to annualize your income. **Complete Lines 37 through 53 of one column before going to the next, beginning with Column A.**

	A First 3 months	B First 5 months	C First 8 months	D All 12 months
37 Write your Illinois base income for each period. See instructions.	37 _____	_____	_____	_____
38 Annualization factors.	38 <u>4</u>	<u>2.4</u>	<u>1.5</u>	<u>1</u>
39 Multiply Line 37 by Line 38. This is your annualized income.	39 _____	_____	_____	_____
40 Exemptions. See instructions.	40 _____	_____	_____	_____
41 Subtract Line 40 from Line 39. This is your Illinois net income.	41 _____	_____	_____	_____
42 Multiply Line 41 by 5% (.05).	42 _____	_____	_____	_____
43 For each period, write the amount you wrote on Step 2, Line 2, Column A.	43 _____	_____	_____	_____
44 Subtract Line 43 from Line 42.	44 _____	_____	_____	_____
45 Applicable percentage.	45 <u>22.5% (.225)</u>	<u>45% (.450)</u>	<u>67.5% (.675)</u>	<u>90% (.900)</u>
46 Multiply Line 44 by Line 45. This is your annualized installment.	46 _____	_____	_____	_____
47 Add the amounts on Line 53 of each of the preceding columns and write the total here.	47 <u>Skip this line for Column A.</u>	_____	_____	_____
48 Subtract Line 47 from Line 46. If less than zero, write "0."	48 _____	_____	_____	_____
49 Write the amount you would have entered in Step 2, Line 9b, if you were not annualizing.	49 _____	_____	_____	_____
50 Write the amount from Line 52 of the preceding column.	50 <u>Skip this line for Column A.</u>	_____	_____	_____
51 Add Lines 49 and 50.	51 _____	_____	_____	_____
52 If Line 51 is greater than Line 48, subtract Line 48 from Line 51. Otherwise, write "0."	52 _____	_____	_____	<u>Skip this line for Column D.</u>
53 Write the lesser of Line 48 or Line 51 here and on Step 2, Line 9b. This is your required installment.	53 _____	_____	_____	_____



FOOTNOTES

STATEMENT 1

ALLOCATION OF FORM IL-505-I, AUTOMATIC
EXTENSION PAYMENT:

BRADLEY S. SCHNEIDER (SSN: [REDACTED])
JULIE R. DANN (SSN: [REDACTED])

4,000.

7,000.

11,000.
