

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

Your first name and initial **BARACK H.** Last name **OBAMA** Your social security number _____

If a joint return, spouse's first name and initial **MICHELLE L.** Last name **OBAMA** Spouse's social security number _____

Home address (number and street). If you have a P.O. box, see instructions. **1600 PENNSYLVANIA AVENUE, NW** Apt. no. _____
 City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below. **WASHINGTON, DC 20500**

Foreign country name _____ Foreign province/state/county _____ Foreign postal code _____
 Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

You Spouse

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

Exemptions
 6a Yourself. If someone can claim you as a dependent, do not check box 6a
 b Spouse
 c Dependents:
 (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) if child under age 17 qualifying for child tax credit

MALIA A OBAMA			DAUGHTER	<input checked="" type="checkbox"/>
NATASHA M OBAMA			DAUGHTER	<input checked="" type="checkbox"/>

 Boxes checked on 6a and 6b **2**
 No. of children on 6c who:
 • lived with you **2**
 • did not live with you due to divorce or separation (see instructions) _____
 Dependents on 6c not entered above _____
 Add numbers on lines above **4**

Income
 7 Wages, salaries, tips, etc. Attach Form(s) W-2 **7 394,796.**
 8a Taxable interest. Attach Schedule B if required **8a 6,575.**
 b Tax-exempt interest. Do not include on line 8a **8b**
 9a Ordinary dividends. Attach Schedule B if required **9a 3.**
 b Qualified dividends **9b**
 10 Taxable refunds, credits, or offsets of state and local income taxes **STMT 1 STMT 3 10 0.**
 11 Alimony received **11**
 12 Business income or (loss). Attach Schedule C or C-EZ **12 104,809.**
 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here **13 -3,000.**
 14 Other gains or (losses). Attach Form 4797 **14**
 15a IRA distributions **15a** b Taxable amount **15b**
 16a Pensions and annuities **16a** b Taxable amount **16b**
 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E **17**
 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 **22 503,183.**

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 1,404.**
 28 Self-employed SEP, SIMPLE, and qualified plans **28 20,681.**
 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 22,085.**
 37 Subtract line 36 from line 22. This is your adjusted gross income **37 481,098.**

Tax and Credits		38	Amount from line 37 (adjusted gross income)	38	481,098.
Standard Deduction for - ● People who check any box on line 39a or 39b: 01 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	39a	Check <input type="checkbox"/> You were born before January 2, 1949, <input type="checkbox"/> Blind. <input type="checkbox"/> Spouse was born before January 2, 1949, <input type="checkbox"/> Blind. Total boxes checked <input type="checkbox"/> 39a <input type="checkbox"/> 39b			
	b	If your spouse itemizes on a separate return or you were a dual-status alien, check here <input type="checkbox"/>			
	40	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	40	147,769.	
	41	Subtract line 40 from line 38	41	333,329.	
	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	333,329.	
	44	Tax. Check if any from: a <input type="checkbox"/> Form(s) 8814 b <input type="checkbox"/> Form 4972 c <input type="checkbox"/>	44	86,312.	
	45	Alternative minimum tax. Attach Form 6251	45	9,513.	
	46	Add lines 44 and 45	46	95,825.	
	47	Foreign tax credit. Attach Form 1116 if required	47	2,773.	
48	Credit for child and dependent care expenses. Attach Form 2441	48			
49	Education credits from Form 8863, line 19	49			
50	Retirement savings contributions credit. Attach Form 8880	50			
51	Child tax credit. Attach Schedule 8812, if required	51			
52	Residential energy credits. Attach Form 5695	52			
53	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	53			
54	Add lines 47 through 53. These are your total credits	54	2,773.		
55	Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-	55	93,052.		
Other Taxes		56	Self-employment tax. Attach Schedule SE	56	2,807.
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			
59b	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	2,310.		
61	Add lines 55 through 60. This is your total tax	61	98,169.		
Payments		62	Federal income tax withheld from Forms W-2 and 1099	62	100,462.
63	2013 estimated tax payments and amount applied from 2012 return	63	16,815.		
If you have a qualifying child, attach Schedule EIC.	64a	Earned income credit (EIC)	64a		
	b	Nontaxable combat pay election <input type="checkbox"/> 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		
	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	117,277.	
Refund		73	If line 72 is more than line 61, subtract line 61 from line 72. This is the amount you overpaid	73	19,108.
74a	Amount of line 73 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	74a			
Direct deposit? See instructions.	b	Routing number <input type="text"/> Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings Account number <input type="text"/>			
75	Amount of line 73 you want applied to your 2014 estimated tax	75	19,108.		
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 **MICHAEL S SOLHEIM** Phone no. Personal identification number (PIN)

Sign Here 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 *[Signature]* Date **4-8-14** Your occupation **US PRESIDENT** Daytime phone number

Spouse's signature. If a joint return, both must sign. *[Signature]* Date **4-8-14** Spouse's occupation **US FIRST LADY** If the IRS sent you an Identity Protection PIN, enter it here

Print preparer's name **MICHAEL S SOLHEIM** Preparer's signature *[Signature]* Date **4/8/14** Check if self-employed PTIN

Preparer Use Only Firm's name **WINEBERG SOLHEIM HOWELL & SHAIN, PC** Firm's EIN

180 N LASALLE ST, STE 2200
CHICAGO, IL 60601
Phone no.

Underpayment of Estimated Tax by Individuals, Estates, and Trusts

▶ 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

BARACK H. & MICHELLE L. OBAMA

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 ↓

Yes → **You must figure your penalty.**

No ↓

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.**

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.**

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	93,052.
2 Other taxes, including self-employment tax and, if applicable, Additional Medicare Tax and/or Net Investment Income Tax (see instructions)	2	5,117.
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	98,169.
5 Multiply line 4 by 90% (.90)	5	88,352.
6 Withholding taxes. Do not include estimated tax payments (see instructions)	6	100,462.
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	0.
8 Maximum required annual payment based on prior year's tax (see instructions)	8	
9 Required annual payment. Enter the smaller of line 5 or line 8	9	

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).

**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

BARACK H. & MICHELLE L. OBAMA

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		
	a <input checked="" type="checkbox"/> Income taxes, or		SEE STATEMENT 7	22,392.
	b <input type="checkbox"/> General sales taxes			
6	Real estate taxes (see instructions)	6		29,176.
7	Personal property taxes	7		
8	Other taxes. List type and amount	8		
9	Add lines 5 through 8	9		51,568.
Interest You Paid	10 Home mortgage interest and points reported to you on Form 1098	10		42,383.
	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		42,383.
Gifts to Charity	16 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	16		59,251. 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		
If you made a gift and got a benefit for it, see instructions.	18 Carryover from prior year	18		
	19 Add lines 16 through 18	19		59,251.
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		
	23 Other expenses - investment, safe deposit box, etc. List type and amount	23		
	24 Add lines 21 through 23	24		
	25 Enter amount from Form 1040, line 38	25		
	26 Multiply line 25 by 2% (.02)	26		
	27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-	27		
Other Miscellaneous Deductions	28 Other - from list in instructions. List type and amount	28		
Total Itemized Deductions	29 Is Form 1040, line 38, over \$150,000? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40. <input checked="" type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter.	29	STMT 9	147,769.
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here			

SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)

Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.

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

OMB No. 1545-0074

2013
Attachment
Sequence No. **08**

Name(s) shown on return

Your social security number

BARACK H. & MICHELLE L. OBAMA

Part I		Amount
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 ▶ BOND PREMIUM AMORTIZATION JP MORGAN NORTHERN TRUST SECURITIES US GOVT INTEREST NORTHERN TRUST SECURITIES US GOVT INTEREST PAID	 -2,465. 433. 15,223. -6,616.
	2 Add the amounts on line 1	6,575.
	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 ... ▶	6,575.
Note. If line 4 is over \$1,500, you must complete Part III.		

Part II		Amount
Ordinary Dividends	5 List name of payer ▶ NORTHERN TRUST SECURITIES	 3.
	6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ... ▶	3.
Note. If line 6 is over \$1,500, you must complete Part III.		

Part III		Yes	No
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		X
	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		
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

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09-30-13

**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

BARACK H. OBAMA

Social security number (SSN)

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

AUTHOR

B Enter code from instructions

711510

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

BARACK H. OBAMA

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

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

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

F Accounting method: (1) Cash (2) Accrual (3) Other (specify) ►

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

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

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

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

Part I Income

1	Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	1	
2	Returns and allowances	2	
3	Subtract line 2 from line 1	3	
4	Cost of goods sold (from line 42)	4	
5	Gross profit. Subtract line 4 from line 3	5	
6	Other income, including federal and state gasoline or fuel tax credit or refund (see instructions) SEE STATEMENT 10	6	116,180.
7	Gross income. Add lines 5 and 6	7	116,180.

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

8	Advertising	8		18	Office expense	18	470.
9	Car and truck expenses (see instructions)	9		19	Pension and profit-sharing plans	19	
10	Commissions and fees	10	10,901.	20	Rent or lease (see instructions):		
11	Contract labor (see instructions)	11		20a	Vehicles, machinery, and equipment	20a	
12	Depletion	12		20b	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	
28	Total expenses before expenses for business use of home. Add lines 8 through 27a	28		26	Wages (less employment credits)	26	
29	Tentative profit or (loss). Subtract line 28 from line 7	29	11,371.	27a	Other expenses (from line 48)	27a	
30	Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method (see instructions). Simplified method filers only: enter the total square footage of: (a) your home: _____ and (b) the part of your home used for business: _____ Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30	30	104,809.	27b	Reserved for future use	27b	
31	Net profit or (loss). Subtract line 30 from line 29. ● If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. (If you checked the box on line 1, see instructions). Estates and trusts, enter on Form 1041, line 3. ● If a loss, you must go to line 32.	31	104,809.	32a	<input type="checkbox"/> All investment is at risk.		
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.			32b	<input type="checkbox"/> Some investment is not at risk.		

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

Schedule C (Form 1040) 2013

**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

2013

Attachment
Sequence No. 12

Name(s) shown on return

Your social security number

BARACK H. & MICHELLE L. OBAMA

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	295,000.	295,000.		0.
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

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

See instructions for how to figure the amounts to enter on the lines below.

This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	1,205,000.	1,205,000.		0.
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12
13 Capital gain distributions				13
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions				14 (112,516.)
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 <112,516.>

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

Schedule D (Form 1040) 2013

Part III Summary

<p>16 Combine lines 7 and 15 and enter the result</p> <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. <p>17 Are lines 15 and 16 both gains?</p> <p><input type="checkbox"/> Yes. Go to line 18.</p> <p><input type="checkbox"/> No. Skip lines 18 through 21, and go to line 22.</p>	16	<u><112,516.></u>
<p>18 Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions</p>	18	
<p>19 Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions</p>	19	
<p>20 Are lines 18 and 19 both zero or blank?</p> <p><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.</p> <p><input type="checkbox"/> No. Complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.</p>		
<p>21 If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of:</p> <ul style="list-style-type: none"> • The loss on line 16 or • (\$3,000), or if married filing separately, (\$1,500) <p style="text-align: center; margin-left: 100px;">} <u>SEE STATEMENT 11</u></p> <p>Note. When figuring which amount is smaller, treat both amounts as positive numbers.</p>	21	(<u>3,000.</u>)
<p>22 Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?</p> <p><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).</p> <p><input checked="" type="checkbox"/> No. Complete the rest of Form 1040 or Form 1040NR.</p>		

Form **8949**

Department of the Treasury
Internal Revenue Service

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.
▶ File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Name(s) shown on return

Social security number or
taxpayer identification no.

BARACK H. & MICHELLE L. OBAMA

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

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see <i>Column (e)</i> in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions.		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s)	(g) Amount of adjustment	
	US TREASURY NOTE REDEMPTION	04/04/12	01/31/13	295,000.	295,000.			0.
2 Totals. Add the amounts in columns (d), (e), (g) and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B above is checked), or line 3 (if Box C above is checked) ▶								
				295,000.	295,000.			0.

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

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

Social security number or taxpayer identification no.

BARACK H. & MICHELLE L. OBAMA

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

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

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

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

- (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
- (E) Long-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
- (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed (Mo., day, yr.)	(d) Proceeds (sales price)	(e) Cost or other basis. See the Note below and see Column (e) in the instructions	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See instructions.		(h) Gain or (loss). Subtract column-(e) from column (d) and combine the result with column (g)
						(f) Code(s)	(g) Amount of adjustment	
	US TREASURY NOTE REDEMPTION	12/15/11	10/15/13	300,000.	300,000.			0.
	US TREASURY NOTE REDEMPTION	04/04/12	10/15/13	400,000.	400,000.			0.
	US TREASURY NOTE REDEMPTION	01/27/11	01/31/13	505,000.	505,000.			0.
2	Totals. Add the amounts in columns (d), (e), (g) and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)				1,205,000.	1,205,000.		0.

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

Name of person with self-employment income (as shown on Form 1040) BARACK H. OBAMA	Social security number of person with self-employment income
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Section B - Long Schedule SE

Part I Self-Employment Tax

Note. If your only income subject to self-employment tax is **church employee income**, see instructions. Also see instructions for the definition of church employee income.

A If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I

1 a Net farm profit or (loss) from Schedule F, line 34, and farm partnerships, Schedule K-1 (Form 1065), box 14, code A. Note. Skip lines 1a and 1b if you use the farm optional method (see instructions)	1a	
b If you received social security retirement or disability benefits, enter the amount of Conservation Reserve Program payments included on Schedule F, line 4b, or listed on Schedule K-1 (Form 1065), box 20, code Z	1b	
2 Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), box 14, code A (other than farming); and Schedule K-1 (Form 1065-B), box 9, code J1. Ministers and members of religious orders, see instructions for types of income to report on this line. See instructions for other income to report. Note. Skip this line if you use the nonfarm optional method (see instructions) SEE STATEMENT 12	2	104,809.
3 Combine lines 1a, 1b, and 2	3	104,809.
4 a If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3 Note. If line 4a is less than \$400 due to Conservation Reserve Program payments on line 1b, see instructions.	4a	96,791.
b If you elect one or both of the optional methods, enter the total of lines 15 and 17 here	4b	
c Combine lines 4a and 4b. If less than \$400, stop ; you do not owe self-employment tax. Exception. If less than \$400 and you had church employee income , enter -0- and continue	4c	96,791.
5 a Enter your church employee income from Form W-2. See instructions for definition of church employee income	5a	
b Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-	5b	
6 Add lines 4c and 5b	6	96,791.
7 Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2013	7	113,700.00
8 a Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$113,700 or more, skip lines 8b through 10, and go to line 11	8a	113,700.
b Unreported tips subject to social security tax (from Form 4137, line 10)	8b	
c Wages subject to social security tax (from Form 8919, line 10)	8c	
d Add lines 8a, 8b, and 8c	8d	
9 Subtract line 8d from line 7. If zero or less, enter -0- here and on line 10 and go to line 11	9	
10 Multiply the smaller of line 6 or line 9 by 12.4% (.124)	10	
11 Multiply line 6 by 2.9% (.029)	11	2,807.
12 Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 56, or Form 1040NR, line 54	12	2,807.
13 Deduction for one-half of self-employment tax. Multiply line 12 by 50% (.50). Enter the result here and on Form 1040, line 27, or Form 1040NR, line 27	13	1,404.

Part II Optional Methods To Figure Net Earnings (see instructions)

Farm Optional Method. You may use this method only if (a) your gross farm income ¹ was not more than \$6,960, or (b) your net farm profits ² were less than \$5,024.		
14 Maximum income for optional methods	14	4,640.00
15 Enter the smaller of: two-thirds (2/3) of gross farm income ¹ (not less than zero) or \$4,640. Also include this amount on line 4b above	15	
Nonfarm Optional Method. You may use this method only if (a) your net nonfarm profits ³ were less than \$5,024 and also less than 72.189% of your gross nonfarm income ⁴ ; and (b) you had net earnings from self-employment of at least \$400 in 2 of the prior 3 years. Caution. You may use this method no more than five times.		
16 Subtract line 15 from line 14	16	
17 Enter the smaller of: two-thirds (2/3) of gross nonfarm income ⁴ (not less than zero) or the amount on line 16. Also include this amount on line 4b above	17	

¹ From Sch. F, line 9, and Sch. K-1 (Form 1065), box 14, code B.
² From Sch. F, line 34, and Sch. K-1 (Form 1065), box 14, code A - minus the amount you would have entered on line 1b had you not used the optional method.
³ From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), box 14, code A; and Sch. K-1 (Form 1065-B), box 9, code J1.
⁴ From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), box 14, code C; and Sch. K-1 (Form 1065-B), box 9, code J2.

Foreign Tax Credit
(Individual, Estate, or Trust)

Department of the Treasury
Internal Revenue Service (99)

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

Attachment
Sequence No. **19**

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

Name

Identifying number as shown on page 1 of your tax return

BARACK H. & MICHELLE L. OBAMA

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

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

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

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

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

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	OTHER COUNTRIES			
1a Gross income from sources within country shown above and of the type checked above:				
	26,633.			1a 26,633.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement) SEE STATEMENT 13	5,524.			
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction	49,739.			
b Other deductions (attach statement)				
c Add lines 3a and 3b	49,739.			
d Gross foreign source income	26,633.			
e Gross income from all sources	517,554.			
f Divide line 3d by line 3e	.051459			
g Multiply line 3c by line 3f	2,560.			
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)	2,104.			
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	10,188.			6 10,188.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 16,445.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued						(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))
		In foreign currency			In U.S. dollars				
		(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends		
A								2,773.	2,773.
B									
C									
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2									8 2,773.

LHA For Paperwork Reduction Act Notice, see instructions.

Part III Figuring the Credit

9 Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	2,773.	
10 Carryback or carryover (attach detailed computation)	10		
11 Add lines 9 and 10	11	2,773.	
12 Reduction in foreign taxes	12		
13 Taxes reclassified under high tax kickout	13		
14 Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14		2,773.
15 Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	16,445.	
16 Adjustments to line 15	16		
17 Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	16,445.	
18 Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption <i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.</i>	18	333,329.	
19 Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19		.049336
20 Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37 <i>Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.</i>	20		86,312.
21 Multiply line 20 by line 19 (maximum amount of credit)	21		4,258.
22 Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22		2,773.

Part IV Summary of Credits From Separate Parts III

23 Credit for taxes on passive category income	23		
24 Credit for taxes on general category income	24		
25 Credit for taxes on certain income re-sourced by treaty	25		
26 Credit for taxes on lump-sum distributions	26		
27 Add lines 23 through 26	27		
28 Enter the smaller of line 20 or line 27	28		2,773.
29 Reduction of credit for international boycott operations	29		
30 Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30		2,773.

Form **6251**

Alternative Minimum Tax - Individuals

OMB No. 1545-0074

2013

Department of the Treasury
Internal Revenue Service (99)

Information about Form 6251 and its separate instructions is at www.irs.gov/form6251.

Attachment
Sequence No. **32**

Attach to Form 1040 or Form 1040NR.

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

Your social security number

BARACK H. & MICHELLE L. OBAMA

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.)	333,329.
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-	
3	Taxes from Schedule A (Form 1040), line 9	51,568.
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line	
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	
6	If Form 1040, line 38, is \$150,000 or less, enter -0-. Otherwise, see instructions	-5,433.
7	Tax refund from Form 1040, line 10 or line 21	
8	Investment interest expense (difference between regular tax and AMT)	
9	Depletion (difference between regular tax and AMT)	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	
11	Alternative tax net operating loss deduction	
12	Interest from specified private activity bonds exempt from the regular tax	
13	Qualified small business stock (7% of gain excluded under section 1202)	
14	Exercise of incentive stock options (excess of AMT income over regular tax income)	
15	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	
16	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	
17	Disposition of property (difference between AMT and regular tax gain or loss)	
18	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	
19	Passive activities (difference between AMT and regular tax income or loss)	
20	Loss limitations (difference between AMT and regular tax income or loss)	
21	Circulation costs (difference between regular tax and AMT)	
22	Long-term contracts (difference between AMT and regular tax income)	
23	Mining costs (difference between regular tax and AMT)	
24	Research and experimental costs (difference between regular tax and AMT)	
25	Income from certain installment sales before January 1, 1987	
26	Intangible drilling costs preference	
27	Other adjustments, including income-based related adjustments	
28	Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$238,550, see instructions.)	379,464.

Part II Alternative Minimum Tax (AMT)

29	Exemption. (If you were under age 24 at the end of 2013, see instructions.)													
	<table border="0"> <tr> <td>IF your filing status is...</td> <td>AND line 28 is not over...</td> <td>THEN enter on line 29...</td> </tr> <tr> <td>Single or head of household</td> <td>\$115,400</td> <td>\$51,900</td> </tr> <tr> <td>Married filing jointly or qualifying widow(er)</td> <td>153,900</td> <td>80,800</td> </tr> <tr> <td>Married filing separately</td> <td>76,950</td> <td>40,400</td> </tr> </table>	IF your filing status is...	AND line 28 is not over...	THEN enter on line 29...	Single or head of household	\$115,400	\$51,900	Married filing jointly or qualifying widow(er)	153,900	80,800	Married filing separately	76,950	40,400	
IF your filing status is...	AND line 28 is not over...	THEN enter on line 29...												
Single or head of household	\$115,400	\$51,900												
Married filing jointly or qualifying widow(er)	153,900	80,800												
Married filing separately	76,950	40,400												
	If line 28 is over the amount shown above for your filing status, see instructions.													
30	Subtract line 29 from line 28. If more than zero, go to line 31. If zero or less, enter -0- here and on lines 31, 33, and 35, and go to line 34	24,409.												
31	<ul style="list-style-type: none"> 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. 	355,055.												
32	Alternative minimum tax foreign tax credit (see instructions)	95,825.												
33	Tentative minimum tax. Subtract line 32 from line 31	2,773.												
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	93,052.												
35	AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45	83,539.												
		9,513.												

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
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		
38	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	38		
39	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	39		
40	Enter the smaller of line 36 or line 39			40
41	Subtract line 40 from line 36			41
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
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		
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		
45	Subtract line 44 from line 43. If zero or less, enter -0-	45		
46	Enter the smaller of line 36 or line 37	46		
47	Enter the smaller of line 45 or line 46. This amount is taxed at 0%	47		
48	Subtract line 47 from line 46	48		
49	Enter the amount from the Line 49 Worksheet in the instructions	49		
50	Enter the smaller of line 48 or line 49	50		
51	Multiply line 50 by 15% (.15)			51
52	Add lines 47 and 50	52		
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		
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		
56	Subtract line 55 from line 36	56		
57	Multiply line 56 by 25% (.25)			57
58	Add lines 42, 51, 54, and 57			58
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
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

ALTERNATIVE MINIMUM TAX

Foreign Tax Credit

(Individual, Estate, or Trust)

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

OMB No. 1545-0121

2013

Attachment Sequence No. 19

Form 1116

Department of the Treasury Internal Revenue Service (99)

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

Name

Identifying number as shown on page 1 of your tax return

BARACK H. & MICHELLE L. OBAMA

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

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

f Resident of (name of country) ▶ UNITED STATES

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

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

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
g Enter the name of the foreign country or U.S. possession	OTHER COUNTRIES			
1a Gross income from sources within country shown above and of the type checked above:				
	26,633.			1a 26,633.
b Check if line 1a is compensation for personal services as an employee, your total compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions) ▶ <input type="checkbox"/>				
Deductions and losses (Caution: See instructions):				
2 Expenses definitely related to the income on line 1a (attach statement)	5,524.			
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction				
b Other deductions (attach statement)				
c Add lines 3a and 3b				
d Gross foreign source income	26,633.			
e Gross income from all sources	517,554.			
f Divide line 3d by line 3e	.051459			
g Multiply line 3c by line 3f				
4 Pro rata share of interest expense:				
a Home mortgage interest (use the Worksheet for Home Mortgage Interest in the instructions)	2,181.			
b Other interest expense				
5 Losses from foreign sources				
6 Add lines 2, 3g, 4a, 4b, and 5	7,705.			6 7,705.
7 Subtract line 6 from line 1a. Enter the result here and on line 15, page 2				7 18,928.

Part II Foreign Taxes Paid or Accrued

Country	Credit is claimed for taxes (you must check one) (h) <input checked="" type="checkbox"/> Paid (i) <input type="checkbox"/> Accrued	Foreign taxes paid or accrued							(r) Other foreign taxes paid or accrued	(s) Total foreign taxes paid or accrued (add cols. (o) through (r))	
		In foreign currency				In U.S. dollars					
		Taxes withheld at source on:				Taxes withheld at source on:					
		(j) Date paid or accrued	(k) Dividends	(l) Rents and royalties	(m) Interest	(n) Other foreign taxes paid or accrued	(o) Dividends	(p) Rents and royalties	(q) Interest		
A								2,773.			2,773.
B											
C											
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2										8	2,773.

LHA For Paperwork Reduction Act Notice, see instructions.

Form 1116 (2013)

ALTERNATIVE MINIMUM TAX

Part III Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I	9	2,773.	
10	Carryback or carryover (attach detailed computation)	10		
11	Add lines 9 and 10	11	2,773.	
12	Reduction in foreign taxes	12		
13	Taxes reclassified under high tax kickout	13		
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	2,773.	
15	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I	15	18,928.	
16	Adjustments to line 15	16		
17	Combine the amounts on lines 15 and 16. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)	17	18,928.	
18	Individuals: Enter the amount from Form 1040, line 41, or Form 1040NR, line 39. Estates and trusts: Enter your taxable income without the deduction for your exemption. <i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see instructions.</i>	18	379,464.	
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	19	.049881	
20	Individuals: Enter the amount from Form 1040, line 44. If you are a nonresident alien, enter the amount from Form 1040NR, line 42. Estates and trusts: Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37. <i>Caution: If you are completing line 20 for separate category e (lump-sum distributions), see instructions.</i>	20	95,825.	
21	Multiply line 20 by line 19 (maximum amount of credit)	21	4,780.	
22	Enter the smaller of line 14 or line 21. If this is the only Form 1116 you are filing, skip lines 23 through 27 and enter this amount on line 28. Otherwise, complete the appropriate line in Part IV	22	2,773.	

Part IV Summary of Credits From Separate Parts III

23	Credit for taxes on passive category income	23		
24	Credit for taxes on general category income	24		
25	Credit for taxes on certain income re-sourced by treaty	25		
26	Credit for taxes on lump-sum distributions	26		
27	Add lines 23 through 26	27		
28	Enter the smaller of line 20 or line 27	28	2,773.	
29	Reduction of credit for international boycott operations	29		
30	Subtract line 29 from line 28. This is your foreign tax credit . Enter here and on Form 1040, line 47; Form 1040NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30	2,773.	

Form 1116

U.S. and Foreign Source Income Summary

NAME

BARACK H. & MICHELLE L. OBAMA

INCOME TYPE	TOTAL	U.S.	FOREIGN GENERAL
Compensation	394,796.	394,796.	
Dividends/Distributions	3.	3.	
Interest	6,575.	6,575.	
Capital Gains			
Business/Profession	116,180.	116,180.	
Rent/Royalty			
State/Local Refunds			
Partnership/S Corporation			
Trust/Estate			
Other Income		-26,633.	26,633.
Gross Income	517,554.	490,921.	26,633.
Less:			
Section 911 Exclusion			
Capital Losses			
Capital Gains Tax Adjustment			
Total Income - Form 1116	517,554.	490,921.	26,633.
Deductions:			
Business/Profession Expenses	11,371.	11,371.	
Rent/Royalty Expenses			
Partnership/S Corporation Losses			
Trust/Estate Losses			
Capital Losses	3,000.	3,000.	
Non-capital Losses			
Individual Retirement Account			
Moving Expenses			
Self-employment Tax Deduction	1,404.	1,404.	
Self-employment Health Insurance			
Keogh Contributions	20,681.	20,681.	
Alimony			
Forfeited Interest			
Foreign Housing Deduction			
Other Adjustments		-5,524.	5,524.
Capital Gains Tax Adjustment			
Total Deductions	36,456.	30,932.	5,524.
Adjusted Gross Income	481,098.	459,989.	21,109.
Less Itemized Deductions:			
Specifically Allocated	57,150.	57,150.	
Home Mortgage Interest	40,880.	38,776.	2,104.
Other Interest			
Ratably Allocated	49,739.	47,179.	2,560.
Total Adjustments to Adjusted Gross Income	147,769.	143,105.	4,664.
Taxable Income Before Exemptions	333,329.	316,884.	16,445.

Form 1116

Allocation of Itemized Deductions

NAME

BARACK H. & MICHELLE L. OBAMA

	Total Itemized Deductions	Itemized Deductions After Sec. 68 Reduction	Form 1116		
			Specifically U.S.	Specifically Foreign	Ratable
Taxes	51,568.	49,739.			49,739.
Interest - Not Including Investment Interest	42,383.	40,880.	38,776.	2,104.	
Contributions	59,251.	57,150.	57,150.		
Miscellaneous Deductions Subject to 2%					
Other Miscellaneous Deductions - Not Including Gambling Losses					
Foreign Adjustment					
Total Itemized Deductions Subject to Sec. 68	153,202.	147,769.			
Add Itemized Deductions Not Subject to Sec. 68:					
Medical/Dental					
Investment Interest					
Casualty Losses					
Gambling Losses					
Foreign Adjustment					
Total Itemized Deductions	153,202.				
Total Allowed on Schedule A		147,769.	95,926.	2,104.	49,739.

NAME

BARACK H. & MICHELLE L. OBAMA

Foreign Income Category

GENERAL LIMITATION INCOME

Regular	2008	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued						2,773.
2. FTC carryback to 2013 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						2,773.
5. Maximum credit allowable						4,258.
6. Unused foreign tax (+) or excess of limit (-)					-3,048.	-1,485.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					-3,048.	-1,485.
Total foreign taxes from all available years to be carried to next year						

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

NAME

BARACK H. & MICHELLE L. OBAMA

Foreign Income Category

GENERAL LIMITATION INCOME

AMT	2008	2009	2010	2011	2012	2013
1. Foreign tax paid/accrued						2,773.
2. FTC carryback to 2013 for amended returns						
3. Reduction in foreign taxes						
4. Foreign tax available						2,773.
5. Maximum credit allowable						4,780.
6. Unused foreign tax (+) or excess of limit (-)					-4,360.	-2,007.
7. Foreign tax carryback						
8. Foreign tax carryforward						
9. Foreign tax or excess limit remaining					-4,360.	-2,007.
Total foreign taxes from all available years to be carried to next year						

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

Additional Medicare Tax

Department of the Treasury
Internal Revenue Service

▶ 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

Attachment
Sequence No. 71

Name(s) shown on Form 1040

BARACK H. & MICHELLE L. OBAMA

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	394,796.	
2 Unreported tips from Form 4137, line 6	2		
3 Wages from Form 8919, line 6	3		
4 Add lines 1 through 3	4	394,796.	
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	250,000.	
6 Subtract line 5 from line 4. If the result is zero or less, enter -0-	6		144,796.
7 Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (.009). Enter here and go to Part II	7		1,303.

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	96,791.	
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	250,000.	
10 Enter the amount from line 4	10	394,796.	
11 Subtract line 10 from line 9. If zero or less, enter -0-	11	0.	
12 Subtract line 11 from line 8. If the result is zero or less, enter -0-	12		96,791.
13 Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (.009). Enter here and go to Part III	13		871.

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		2,174.
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Part V Withholding Reconciliation

19 Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	7,478.	
20 Enter the amount from line 1	20	394,796.	
21 Multiply line 20 by 1.45% (.0145). This is your regular Medicare tax withholding on Medicare wages	21	5,725.	
22 Subtract line 21 from line 19. This is your Additional Medicare Tax withholding on Medicare wages	22		1,753.
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		1,753.

Net Investment Income Tax - Individuals, Estates, and Trusts

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041.

Attachment
Sequence No. 72

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

Name(s) shown on Form 1040 or Form 1041

BARACK H. & MICHELLE L. OBAMA

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	6,575.
2	Ordinary dividends (Form 1040, line 9a; or Form 1041, line 2a)		2	3.
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		
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	
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		-3,000.
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	-3,000.
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	3,578.

Part II Investment Expenses Allocable to Investment Income and Modifications

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

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	3,578.
Individuals:				
13	Modified adjusted gross income (see instructions)	13	481,098.	
14	Threshold based on filing status (see instructions)	14	250,000.	
15	Subtract line 14 from line 13. If zero or less, enter -0-	15	231,098.	
16	Enter the smaller of line 12 or line 15		16	3,578.
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and on Form 1040, line 60		17	136.
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.

BARACK H. & MICHELLE L. OBAMA

FORM 1040

STATE AND LOCAL INCOME TAX REFUNDS

STATEMENT

1

2012

2011

2010

ILLINOIS

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

492.

NET TAX REFUNDS ILLINOIS

492.

TOTAL NET TAX REFUNDS

492.

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 15,600.

3. ENTER THE AMOUNT FROM FORM 1040, LINE 38 481,098.

4. ENTER THE AMOUNT FOR YOUR FILING STATUS 300,000.

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. 181,098.

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.

BARACK H. & MICHELLE L. OBAMA

FORM 1040	TAXABLE STATE AND LOCAL INCOME TAX REFUNDS	STATEMENT	3
	2012	2011	2010
NET TAX REFUNDS FROM STATE AND LOCAL INCOME TAX REFUNDS STMT.	492.		
LESS: REFUNDS-NO BENEFIT DUE TO AMT -SALES TAX BENEFIT REDUCTION	492.		
1 NET REFUNDS FOR RECALCULATION			
2 TOTAL ITEMIZED DEDUCTIONS BEFORE PHASEOUT	258,385.		
3 DEDUCTION NOT SUBJ TO PHASEOUT			
4 NET REFUNDS FROM LINE 1			
5 LINE 2 MINUS LINES 3 AND 4	258,385.		
6 MULT LN 5 BY APPL SEC. 68 PCT			
7 PRIOR YEAR AGI			
8 ITEM. DED. PHASEOUT THRESHOLD			
9 SUBTRACT LINE 8 FROM LINE 7 (IF ZERO OR LESS, SKIP LINES 10 THROUGH 15, AND ENTER AMOUNT FROM LINE 1 ON LINE 16)			
10 MULT LN 9 BY APPL SEC. 68 PCT			
11 ALLOWABLE ITEMIZED DEDUCTIONS (LINE 5 LESS THE LESSER OF LINE 6 OR LINE 10)			
12 ITEM DED. NOT SUBJ TO PHASEOUT			
13A TOTAL ADJ. ITEMIZED DEDUCTIONS	258,385.		
13B PRIOR YR. STD. DED. AVAILABLE	11,900.		
14 PRIOR YR. ALLOWABLE ITEM. DED.	258,385.		
15 SUBTRACT THE GREATER OF LINE 13A OR LINE 13B FROM LINE 14			
16 TAXABLE REFUNDS (LESSER OF LINE 15 OR LINE 1)			
17 ALLOWABLE PRIOR YR. ITEM. DED.	258,385.		
18 PRIOR YEAR STD. DED. AVAILABLE	11,900.		
19 SUBTRACT LINE 18 FROM LINE 17	246,485.		
20 LESSER OF LINE 16 OR LINE 19			
21 PRIOR YEAR TAXABLE INCOME	335,026.		
22 AMOUNT TO INCLUDE ON FORM 1040, LINE 10			
* IF LINE 21 IS -0- OR MORE, USE AMOUNT FROM LINE 20			0.
* IF LINE 21 IS A NEGATIVE AMOUNT, NET LINES 20 AND 21			0.
STATE AND LOCAL INCOME TAX REFUNDS PRIOR TO 2010			
TOTAL TO FORM 1040, LINE 10			0.

BARACK H. OBAMA

1. PLAN CONTRIBUTION RATE OR SELF-EMPLOYED PERSON'S RATE200000
2. NET EARNINGS FROM SCHEDULE C, SCHEDULE F, OR SCHEDULE K-1	104,809.
3. DEDUCTION FOR SELF-EMPLOYMENT TAX FROM 1040, LINE 27	1,404.
4. SUBTRACT LINE 3 FROM LINE 2	103,405.
5. MULTIPLY LINE 4 TIMES LINE 1	20,681.
6. MULTIPLY \$255,000 BY YOUR PLAN CONTRIBUTION RATE. ENTER THE RESULT BUT NOT MORE THAN \$51,000	51,000.
7. ENTER THE SMALLER OF LINE 5 OR LINE 6	20,681.
8. CONTRIBUTION DOLLAR LIMIT	51,000.
*IF ANY ELECTIVE DEFERRALS WERE MADE, GO TO LINE 9. *OTHERWISE, SKIP LINES 9 THROUGH 18 AND ENTER THE SMALLER OF LINE 7 OR LINE 8 ON LINE 19.	
9. ALLOWABLE ELECTIVE DEFERRALS	
10. SUBTRACT LINE 9 FROM LINE 8	
11. SUBTRACT LINE 9 FROM LINE 4	
12. ENTER ONE-HALF OF LINE 11	
13. ENTER THE SMALLEST OF LINES 7, 10 OR 12	
14. SUBTRACT LINE 13 FROM LINE 4	
15. ENTER THE SMALLER OF LINE 9 OR LINE 14	
*IF CATCH-UP CONTRIBUTIONS WERE MADE, GO TO LINE 16. *OTHERWISE, SKIP LINES 16 THROUGH 18.	
16. SUBTRACT LINE 15 FROM LINE 14	
17. CATCH-UP CONTRIBUTION (AGE 50 OR OLDER)	
18. ENTER THE SMALLER OF LINE 16 OR LINE 17	
19. ADD LINES 13, 15 AND 18. ENTER HERE AND ON LINE 28, FORM 1040	20,681.

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T DFAS-CIVPAY DIRECTORATE	394,796.	98,709.	18,900.		7,049.	7,478.
TOTALS	394,796.	98,709.	18,900.		7,049.	7,478.

BARACK H. & MICHELLE L. OBAMA

FORM 1040 FEDERAL INCOME TAX WITHHELD STATEMENT 6

T S DESCRIPTION	AMOUNT
T DFAS-CIVPAY DIRECTORATE	98,709.
FORM 8959, LINE 24	1,753.
TOTAL TO FORM 1040, LINE 62	100,462.

SCHEDULE A STATE AND LOCAL INCOME TAXES STATEMENT 7

DESCRIPTION	AMOUNT
DFAS-CIVPAY DIRECTORATE	18,900.
ILLINOIS 4TH QTR ESTIMATE PAYMENTS	3,000.
ILLINOIS PRIOR YEAR OVERPAYMENT APPLIED	492.
TOTAL TO SCHEDULE A, LINE 5	22,392.

SCHEDULE A CASH CONTRIBUTIONS STATEMENT 8

DESCRIPTION	AMOUNT 50% LIMIT	AMOUNT 30% LIMIT
AMERICAN RED CROSS	4,000.	
BOYS & GIRLS CLUB	1,000.	
CALVARY WOMEN'S SHELTER	1,500.	
CARE	2,000.	
CENTRAL ILLINOIS FOOD BANK	1,500.	
CITIZENS UNITED FOR RESEARCH IN EPILEPSY	1,500.	
FISHER HOUSE FOUNDATION	8,751.	
HABITAT FOR HUMANITY	1,500.	
ILLINOIS HEAD START ASSOCIATION	1,500.	
ILLINOIS READING COUNCIL	1,500.	
JUVENILE DIABETES RESEARCH FOUNDATION	1,500.	
LEUKEMIA & LYMPHOMA SOCIETY	1,500.	
LIFE PIECES TO MASTERPIECES	1,000.	
MIDTOWN EDUCATIONAL FOUNDATION	1,000.	
MIRIAM'S KITCHEN	1,000.	
MOSAIC YOUTH THEATRE OF DETROIT	1,000.	
MUJERES LATINAS EN ACCION	1,000.	
NATIONAL AIDS FUND	1,500.	

BARACK H. & MICHELLE L. OBAMA

NATIONAL COALITION FOR HOMELESS VETERANS	1,500.	
NATIONAL CONGRESS OF BLACK WOMEN	1,500.	
NATIONAL MS SOCIETY	1,500.	
NATIONAL OVARIAN CANCER COALITION	1,500.	
ONE FUND BOSTON	2,000.	
ROCHELLE LEE FUND / BOUNDLESS READERS	1,500.	
SIDWELL FRIENDS SCHOOL	5,000.	
ST. JOHN'S CHURCH	1,500.	
ST. LEO'S RESIDENCE FOR VETERANS	1,500.	
THE CHRISTOPHER HOUSE	1,500.	
THE HARMONY PROJECT	1,500.	
UNITED NEGRO COLLEGE FUND	1,500.	
UNIVERSITY OF HAWAII FOUNDATION	1,500.	
WASHINGTON HUMANE SOCIETY	1,500.	
	<hr/>	
SUBTOTALS	59,251.	
	<hr/>	
TOTAL TO SCHEDULE A, LINE 16		59,251.
		<hr/>

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	153,202.
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	153,202.
4.	MULTIPLY LINE 3 BY 80% (.80).	122,562.
5.	ENTER THE AMOUNT FROM FORM 1040, LINE 38.	481,098.
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	300,000.
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	181,098.
8.	MULTIPLY LINE 7 BY 3% (.03)	5,433.
9.	ENTER THE SMALLER OF LINE 4 OR LINE 8	5,433.
10.	TOTAL ITEMIZED DEDUCTIONS. SUBTRACT LINE 9 FROM LINE 1. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 29	147,769.

SCHEDULE C	OTHER INCOME	STATEMENT 10
DESCRIPTION	AMOUNT	
DYSTELE & GODERICH		85,041.
RANDOM HOUSE		31,139.
TOTAL TO SCHEDULE C, LINE 6		116,180.

SCHEDULE D	CAPITAL LOSS CARRYOVER	STATEMENT 11
1. ENTER THE AMOUNT FROM FORM 1040, LINE 41		333,329.
2. ENTER THE LOSS FROM SCHEDULE D, LINE 21, AS A POSITIVE AMOUNT.		3,000.
3. COMBINE LINES 1 AND 2. IF ZERO OR LESS, ENTER -0-		336,329.
4. ENTER THE SMALLER OF LINE 2 OR LINE 3		3,000.
5. ENTER THE LOSS FROM SCHEDULE D, LINE 7, AS A POSITIVE AMOUNT .		
6. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 15		
7. ADD LINES 4 AND 6		
8. SHORT-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 7 FROM LINE 5. IF ZERO OR LESS, ENTER -0- . . .		
9. ENTER THE LOSS FROM SCHEDULE D, LINE 15, AS A POSITIVE AMOUNT.		112,516.
10. ENTER THE GAIN, IF ANY, FROM SCHEDULE D, LINE 7		
11. SUBTRACT LINE 5 FROM LINE 4. IF ZERO OR LESS, ENTER -0-	3,000.	
12. ADD LINES 10 AND 11		3,000.
13. LONG-TERM CAPITAL LOSS CARRYOVER TO NEXT YEAR. SUBTRACT LINE 12 FROM LINE 9. IF ZERO OR LESS, ENTER -0- . . .		109,516.

SCHEDULE SE	NON-FARM INCOME	STATEMENT 12
DESCRIPTION		AMOUNT
AUTHOR		104,809.
TOTAL TO SCHEDULE SE, LINE 2		104,809.

FORM 1116	EXPENSES DIRECTLY ALLOCABLE TO FOREIGN INCOME	STATEMENT 13
DESCRIPTION	COUNTRY	AMOUNT
OTHER EXPENSES DIRECTLY ALLOCATED	OTHER COUNTRIES	5,524.
TOTAL TO FORM 1116, PART I, LINE 2		5,524.

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.	80,800.
2	ENTER YOUR ALTERNATIVE MINIMUM TAXABLE INCOME (AMTI) FORM 6251, LINE 28	379,464.
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	153,900.
4	SUBTRACT LINE 3 FROM LINE 2. IF ZERO OR LESS ENTER -0-	225,564.
5	MULTIPLY LINE 4 BY 25% (.25).	56,391.
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	24,409.
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	

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

BARACK H. OBAMA
 MICHELLE L. OBAMA
 1600 PENNSYLVANIA AVENUE NW
 WASHINGTON, DC 20500

- 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 U.S. 1040EZ, Line 4. (Whole dollars only)	1	<u>481,098</u>	.00
	2 Federally tax-exempt interest and dividend income from your U.S. 1040 or 1040A, Line 8b; or U.S. 1040EZ.	2		.00
	3 Other additions. Attach Schedule M.	3		.00
	4 Total income. Add Lines 1 through 3.	4	<u>481,098</u>	.00

Staple W-2 and 1099 forms here

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. Check if Line 7 includes any amount from Schedule 1299-C. <input type="checkbox"/>	7	<u>6,142</u>	.00
	8 Add Lines 5, 6, and 7. This is the total of your subtractions.	8	<u>6,142</u>	.00
9 Illinois base income. Subtract Line 8 from Line 4.	9	<u>474,956</u>	.00	

Step 4: Exemptions	10 a Number of exemptions from your federal return. <u>4</u> x \$2,100	a	<u>8,400</u>	.00
	b If someone can claim you as a dependent, see instructions. ___ x \$2,100	b		.00
	c Check if 65 or older: <input type="checkbox"/> You + <input type="checkbox"/> Spouse = ___ x \$1,000	c		.00
	d Check if legally blind: <input type="checkbox"/> You + <input type="checkbox"/> Spouse = ___ x \$1,000	d		.00
Exemption allowance. Add Lines a through d.	10		<u>8,400</u>	.00

Staple your check and IL-1040-V

Step 5: Net Income	11 <i>Residents:</i> Net income. Subtract Line 10 from Line 9. <i>Skip</i> Line 12.	11	<u>466,556</u>	.00
	12 <i>Nonresidents and part-year residents:</i> Check the box that applies to you during 2013 <input type="checkbox"/> Nonresident <input type="checkbox"/> Part-year resident, and write the Illinois base income from Sch. NR. Attach Sch. NR.	12		.00

Step 6: Tax	13 <i>Residents:</i> Multiply Line 11 by 5% (.05). Cannot be less than zero. <i>Nonresidents and part-year residents:</i> Write the tax from Schedule NR.	13	<u>23,328</u>	.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	<u>23,328</u>	.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		.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		.00
20 Tax after nonrefundable credits. Subtract Line 19 from Line 15.	20	<u>23,328</u>	.00	



21 Tax after nonrefundable credits from Page 1, Line 20. 21 23,328 .00

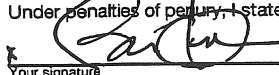
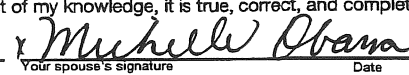

Step 8: 22 Household employment tax. See instructions. 22 _____ .00
Other 23 Use tax on internet, mail order, or other out-of-state purchases from
Taxes UT Worksheet or UT Table in the instructions. **Do not** leave blank. 23 0 .00
24 Total Tax. Add Lines 21, 22, and 23. 24 23,328 .00

Step 9: 25 Illinois Income Tax withheld. **Attach** all W-2 and 1099 forms. 25 18,900 .00
Payments 26 Estimated payments from Forms IL-1040-ES and IL-505-I,
and including overpayment applied from 2012 return. 26 3,492 .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 22,392 .00

Step 10: 30 **Overpayment.** If Line 29 is greater than Line 24, subtract Line 24 from Line 29. 30 _____ .00
Result 31 **Underpayment.** If Line 24 is greater than Line 29, subtract Line 29 from Line 24. 31 936 .00

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.
of Estimated b Check if you or your spouse are 65 or older and permanently
Tax Penalty living in a nursing home.
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.
d Check if you were not required to file an Illinois Individual Income Tax
return in the previous tax year.
33 Voluntary charitable donations. **Attach** Schedule G. 33 _____ .00
34 Total penalty and donations. Add Lines 32 and 33. 34 _____ .00

Step 12: 35 If you have an overpayment on Line 30 and this amount is greater than
Refund or Line 34, subtract Line 34 from Line 30. This is your remaining **overpayment.** 35 _____ .00
Amount You 36 Amount from Line 35 you want **refunded to you.** Check one box on Line 37. See instructions. 36 _____ .00
Owe 37 I choose to receive my refund by
 direct deposit - Complete the information below if you check this box.
Routing number _____ Checking or Savings
Account number _____
 Illinois Individual Income Tax refund debit card
 paper check
38 Subtract Line 36 from Line 35. This amount will be **applied to your 2014 estimated tax.** 38 _____ .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.** 39 936 .00

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  4/18/14  4/18/14
Date Your signature Date Daytime phone number Your spouse's signature Date
 4/15/14 _____
Paid preparer's signature Date Preparer's phone number Preparer's FEIN, SSN, or PTIN

Third Party Check, and complete below, to allow another person to discuss this return with the Illinois Department of Revenue.
Designee **MICHAEL S SOLHEIM**
Designee's name (please print) Designee's phone number _____

Form 1099-G 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.

 If no payment enclosed, mail to:
ILLINOIS DEPARTMENT OF REVENUE
PO BOX 1040
GALESBURG IL 61402-1040

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

349002
01-02-14

ID: 2BX

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

DR _____ AP _____ RR _____ DC _____ IR _____



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

Other Additions and Subtractions for Individuals

IL Attachment No. 15

Read this information first

Complete this schedule if you are required to add certain income on Form IL-1040, Line 3, or if you are entitled to take subtractions on Form IL-1040, Line 7.

Note If you are required to complete Schedule 1299-C, Schedule F, or Form IL-4562, you must do so before you complete this schedule.

Step 1: Provide the following information

BARACK H. & MICHELLE L. OBAMA

Your name as shown on Form IL-1040.

Your Social Security number.

Step 2: Figure your additions for Form IL-1040, Line 3

Write the amount of	(Whole dollars only)
1 Your child's federally tax-exempt interest and dividend income as reported on U.S. Form 8814	1 _____ .00
2 Distributive share of additions you received from a partnership, S corporation, trust, or estate. Attach Illinois Schedule K-1-P or Schedule K-1-T.	2 _____ .00
3 Lloyds plan of operations loss, if reported on your behalf on Form IL-1023-C and included in your adjusted gross income	3 _____ .00
4 Earnings distributed from IRC Section 529 college savings and tuition programs if not included in your adjusted gross income (Do not include distributions from "Bright Start," "Bright Directions," or "College Illinois" programs or programs that meet certain disclosure requirements - see instructions.)	4 _____ .00
5 Illinois special depreciation addition amount from Form IL-4562, Step 2, Line 4. Attach Form IL-4562.	5 _____ .00
6 Business expense recapture (nonresidents only)	6 _____ .00
7 Recapture of deductions for contributions to Illinois college savings plans transferred to an out-of-state plan	7 _____ .00
8 Credit taken on Schedule 1299-C for student-assistance contributions you made as an employer	8 _____ .00
9 Recapture of deductions for contributions to college savings plans withdrawn for nonqualified expenses or refunded	9 _____ .00
10 Other income - Identify each item _____	10 _____ .00
11 Total Additions. Add Lines 1 through 10. Write the amount here and on Form IL-1040, Line 3.	11 _____ .00

Step 3: Figure your subtractions for Form IL-1040, Line 7

Write the amount of	
12 Contributions made to the following college savings plans:	
a "Bright Start" College Savings Pool	12a _____ .00
b "College Illinois" Prepaid Tuition Program	12b _____ .00
c "Bright Directions" College Savings Pool	12c _____ .00
13 Distributive share of subtractions from a partnership, S corporation, trust, or estate. (Do not include any amounts contained in Lines 20 or 22 of this schedule.) Attach Illinois Schedule K-1-P or K-1-T identifying you as the partner, shareholder, or beneficiary and listing your Social Security number.	13 _____ .00
14 Restoration of amounts held under claim of right under Internal Revenue Code, Section 1341	14 _____ .00
15 Contributions to a job training project	15 _____ .00
16 Expenses related to federal credits or federally tax-exempt income	16 _____ .00
17 Interest earned on investments through the Home Ownership Made Easy Program	17 _____ .00
18 Illinois special depreciation subtraction amount from Form IL-4562, Step 3, Line 10. Attach Form IL-4562.	18 _____ .00
Write the following only if included in Form IL-1040, Lines 1, 2, or 3:	
19 Military pay earned. Attach military W-2.	19 _____ .00
20 U.S. Treasury bonds, bills, notes, savings bonds, and U.S. agency interest from U.S. 1040A or 1040. Attach a copy of U.S. 1040A or 1040, Schedule B, if required federally. SEE STATEMENT 3	20 _____ 6,142 .00
21 August 1, 1969, valuation limitation amount from your Schedule F, Line 17. Attach Schedule F and required federal forms.	21 _____ .00
22 River edge redevelopment zone and high impact business dividend subtraction amount from your Schedule 1299-C, Step 2, Line 7. Attach Schedule 1299-C.	22 _____ .00
23 Add Lines 12a through 22 and write the amount here and on Page 2, Line 24.	23 _____ 6,142 .00



Step 3: Continued

24	Write the amount from Page 1, Line 23.	24	<u>6,142.00</u>
25	Recovery of items previously deducted on U.S. 1040, Schedule A (including refunds of any state and local income taxes, other than Illinois). Attach a copy of U.S. 1040, Page 1, and required federal forms.	25	<u>.00</u>
26	Ridesharing money and other benefits	26	<u>.00</u>
27	Payment of life insurance, endowment, or annuity benefits received	27	<u>.00</u>
28	Lloyds plan of operations income if reported on your behalf on Form IL-1023-C	28	<u>.00</u>
29	Income earned by certain trust accounts established under the Illinois Pre-Need Cemetery Sales Act	29	<u>.00</u>
30	Education loan repayments made for primary care physicians who agree to practice in designated shortage areas under the Family Practice Residency Act	30	<u>.00</u>
31	Reparations or other amounts received as a victim of persecution by Nazi Germany	31	<u>.00</u>
32	Interest on the following tax-exempt obligations of Illinois state and local government. Do not include interest you received indirectly through owning shares in a mutual fund.		
a	Illinois Housing Development Authority bonds and notes (except housing-related commercial facilities bonds and notes)	32a	<u>.00</u>
b	Export Development Act of 1983 bonds	32b	<u>.00</u>
c	Illinois Development Finance Authority bonds, notes, and other obligations (venture fund and infrastructure bonds only)	32c	<u>.00</u>
d	Quad Cities Regional Economic Development Authority bonds and notes (if declared to be exempt from taxation by the Authority)	32d	<u>.00</u>
e	College Savings bonds	32e	<u>.00</u>
f	Illinois Sports Facilities Authority bonds	32f	<u>.00</u>
g	Higher Education Student Assistance Act bonds	32g	<u>.00</u>
h	Illinois Development Finance Authority bonds issued under the Illinois Development Finance Authority Act, Sections 7.80 through 7.87	32h	<u>.00</u>
i	Rural Bond Bank Act bonds and notes	32i	<u>.00</u>
j	Illinois Development Finance Authority bonds issued under the Asbestos Abatement Finance Act	32j	<u>.00</u>
k	Quad Cities Interstate Metropolitan Authority bonds	32k	<u>.00</u>
l	Southwestern Illinois Development Authority bonds	32l	<u>.00</u>
m	Illinois Finance Authority bonds issued under the Illinois Finance Authority Act, Sections 820.60 and 825.55 or the Asbestos Abatement Finance Act	32m	<u>.00</u>
n	Illinois Power Agency bonds issued by the Illinois Finance Authority	32n	<u>.00</u>
o	Central Illinois Economic Development Authority bonds	32o	<u>.00</u>
p	Eastern Illinois Economic Development Authority bonds	32p	<u>.00</u>
q	Southeastern Illinois Economic Development Authority bonds	32q	<u>.00</u>
r	Southern Illinois Economic Development Authority bonds	32r	<u>.00</u>
s	Illinois Urban Development Authority bonds	32s	<u>.00</u>
t	Downstate Illinois Sports Facilities Authority bonds	32t	<u>.00</u>
u	Western Illinois Economic Development Authority bonds	32u	<u>.00</u>
v	Upper Illinois River Valley Development Authority Act bonds	32v	<u>.00</u>
w	Will-Kankakee Regional Development Authority bonds	32w	<u>.00</u>
33	Interest on the following non-U.S. government bonds.		
a	Bonds issued by the government of Guam	33a	<u>.00</u>
b	Bonds issued by the government of Puerto Rico	33b	<u>.00</u>
c	Bonds issued by the government of the Virgin Islands	33c	<u>.00</u>
d	Bonds issued by the government of American Samoa	33d	<u>.00</u>
e	Bonds issued by the government of the Northern Mariana Islands	33e	<u>.00</u>
f	Mutual mortgage insurance fund bonds	33f	<u>.00</u>
34	Amount of your child's interest from U.S. Treasury and U.S. agency obligations or from sources in Line 20, 32 or 33 as reported on U.S. Form 8814	34	<u>.00</u>
35	Railroad sick pay and unemployment income. Attach Form 1099-G or W-2 and a copy of your federal return.	35	<u>.00</u>
36	Unjust imprisonment compensation awarded by Illinois Court of Claims	36	<u>.00</u>
37	Distributions from "Bright Start," "College Illinois," and "Bright Directions" college savings plans if included in Line 1 because you claimed a federal American Opportunity or Lifetime Learning Credit	37	<u>.00</u>
38	Total Subtractions. Add Lines 24 through 37. Write the amount here and on Form IL-1040, Line 7.	38	<u>6,142.00</u>



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

BARACK H. & MICHELLE L. OBAMA

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	23,328.		29,450.
2 Write the amount of credits from each tax return. See instructions.	2			
3 Subtract Line 2 from Line 1.	3	23,328.		29,450.
4a Write the total amount of this year's Illinois withholding from your W-2 forms.	4a	18,900.		
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	18,900.		
5 Subtract Line 4c from Line 3.	5	4,428.		
6 Multiply Column A, Line 3, by 90% (.9).	6	20,995.		
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	20,995.		
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	5,249.		

	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 01/15/14
9a Write the installment due date for each quarter. See instructions.				
9b Write the required installment. See instructions.	4,245.	4,198.	6,066.	6,486.
10a Write any credit carried forward from the prior year.	492.	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.	4,725.	4,725.	4,725.	4,725.
10c Write the amount of pass-through payments.				
10d Add Lines 10a through 10c in each column.	5,217.	4,725.	4,725.	4,725.
11 Subtract Line 10d from Line 9b. If the amount is negative, use brackets.	<972.>	<527.>	1,341.	1,761.
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.	972.	1,499.	158.
13 Subtract Line 12 from Line 11. If the amount is negative, use brackets.	<972.>	<1,499.>	<158.>	1,603.

Continue with Step 3 on Page 2 →



Step 3: Figure your unpaid tax



- 14 Write the amount from Column A, Line 3. 14 23,328.
- 15 Write the amount of household employment tax from IL-1040, Line 22. 15 _____
- 16 Write the amount of use tax from IL-1040, Line 23. 16 _____
- 17 Add Lines 14 through 16. Write the total amount here. 17 23,328.
- 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-I 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. 18 23,328.
- 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.
- 19 0.

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	3,000.	12/30/13	e	_____	_____	i	_____	_____
b	_____	_____	f	_____	_____	j	_____	_____
c	_____	_____	g	_____	_____	k	_____	_____
d	_____	_____	h	_____	_____	l	_____	_____

Penalty rates

Number of days late	Penalty rate
1 - 3002
31 or more10

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	01/15/14	1,603.	3,000.	1,603.	01/15/14			
		1,603.		-1,397.	01/15/14			

- 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 0

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	B	C	D
	First 3 months	First 5 months	First 8 months	All 12 months
37 Write your Illinois base income for each period. See instructions.	37 96,428.	159,860.	292,196.	474,956.
38 Annualization factors.	38 4	2.4	1.5	1
39 Multiply Line 37 by Line 38. This is your annualized income.	39 385,712.	383,664.	438,294.	474,956.
40 Exemptions. See instructions.	40 8,400.	8,400.	8,400.	8,400.
41 Subtract Line 40 from Line 39. This is your Illinois net income.	41 377,312.	375,264.	429,894.	466,556.
42 Multiply Line 41 by 5% (.05).	42 18,866.	18,763.	21,495.	23,328.
43 For each period, write the amount you wrote on Step 2, Line 2, Column A.	43 18,866.	18,763.	21,495.	23,328.
44 Subtract Line 43 from Line 42.	44 18,866.	18,763.	21,495.	23,328.
45 Applicable percentage.	45 22.5% (.225)	45% (.450)	67.5% (.675)	90% (.900)
46 Multiply Line 44 by Line 45. This is your annualized installment.	46 4,245.	8,443.	14,509.	20,995.
47 Add the amounts on Line 53 of each of the preceding columns and write the total here.	47 Skip this line for Column A.	4,245.	8,443.	14,509.
48 Subtract Line 47 from Line 46. If less than zero, write "0."	48 4,245.	4,198.	6,066.	6,486.
49 Write the amount you would have entered in Step 2, Line 9b, if you were not annualizing.	49 5,249.	5,249.	5,249.	5,248.
50 Write the amount from Line 52 of the preceding column.	50 Skip this line for Column A.	1,004.	2,055.	1,238.
51 Add Lines 49 and 50.	51 5,249.	6,253.	7,304.	6,486.
52 If Line 51 is greater than Line 48, subtract Line 48 from Line 51. Otherwise, write "0."	52 1,004.	2,055.	1,238.	Skip this line for Column D.
53 Write the lesser of Line 48 or Line 51 here and on Step 2, Line 9b. This is your required installment.	53 4,245.	4,198.	6,066.	6,486.



BARACK H. & MICHELLE L. OBAMA

IL-SCHEDULE M	U.S. GOVERNMENT OBLIGATIONS	STATEMENT 3
DESCRIPTION	AMOUNT	
BOND PREMIUM AMORTIZATION	-2,465.00	
NORTHERN TRUST SECURITIES US GOVT INTEREST	15,223.00	
NORTHERN TRUST SECURITIES US GOVT INTEREST PAID	-6,616.00	
TOTAL TO FORM IL-SCHEDULE M, LINE 20	6,142.00	

SCHEDULE B
(Form 1040A or 1040)

Interest and Ordinary Dividends

OMB No. 1545-0074

2013
Attachment
Sequence No. **08**

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

▶ Attach to Form 1040A or 1040.

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

Your social security number

BARACK H. & MICHELLE L. OBAMA

		Amount
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 ▶ BOND PREMIUM AMORTIZATION	-2,465.
	JP MORGAN	433.
	NORTHERN TRUST SECURITIES US GOVT INTEREST	15,223.
	NORTHERN TRUST SECURITIES US GOVT INTEREST PAID	-6,616.
	1	
	2 Add the amounts on line 1	6,575.
	3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3
	4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ... ▶	6,575.
Note. If line 4 is over \$1,500, you must complete Part III.		Amount

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.

Part II Ordinary Dividends	5 List name of payer ▶ NORTHERN TRUST SECURITIES	3.
	5	
	6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ... ▶	3.
Note. If line 6 is over \$1,500, you must complete Part III.		

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.

		Yes	No	
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		X	
	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			
	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		

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