

Amended U.S. Individual Income Tax Return

OMB No. 1545-0074

(Rev. December 2012)

Information about Form 1040X and its separate instructions is at www.irs.gov/form1040X.This return is for calendar year ☒ 2012 ☐ 2011 ☐ 2010 ☐ 2009

Other year. Enter one: calendar year or fiscal year (month and year ended):

Your first name and initial JOHN F	Last name MONTGOMERY	Your social security number 240-31-9433
If a joint return, spouse's first name and initial KIM	Last name MONTGOMERY	Spouse's social security number 136-62-3741
Home address (number and street). If you have a P.O. box, see instructions. 1021 ANTIOCH WOODS LANE		Apt. no. Your phone number 919-345-6817
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). WEDDINGTON NC 28104		
Foreign country name	Foreign province/state/country	Foreign postal code

Amended return filing status. You must check one box even if you are not changing your filing status.

Caution. In general, you cannot change your filing status from joint to separate returns after the due date.

☐ Single ☒ Married filing jointly ☐ Married filing separately
☐ Qualifying widow(er) ☐ Head of household (if the qualifying person is a child but not your dependent, see instructions.)

Use Part III on page 2 to explain any changes

Income and Deductions

		A. Original amount or as previously adjusted (see instructions)	B. Net change - amount of increase or (decrease) - explain in Part III	C. Correct amount
1	Adjusted gross income. If net operating loss (NOL) carryback is included, check here <input type="checkbox"/>	239,799	1,000	240,799
2	Itemized deductions or standard deduction	28,089		28,089
3	Subtract line 2 from line 1	211,710	1,000	212,710
4	Exemptions. If changing, complete Part I on page 2 and enter the amount from line 30	15,200		15,200
5	Taxable income. Subtract line 4 from line 3	196,510	1,000	197,510

Tax Liability

6	Tax. Enter method used to figure tax: QDCGTW	44,570	286	44,856
7	Credits. If general business credit carryback is included, check here <input type="checkbox"/>	893		893
8	Subtract line 7 from line 6. If the result is zero or less, enter -0-	43,677	286	43,963
9	Other taxes			
10	Total tax. Add lines 8 and 9	43,677	286	43,963

Payments

11	Federal income tax withheld and excess social security and tier 1 RRTA tax withheld (if changing, see instructions)	44,686		44,686
12	Estimated tax payments, including amount applied from prior year's return			
13	Earned income credit (EIC)			
14	Refundable credits from Schedule(s) <input type="checkbox"/> 8812 or <input type="checkbox"/> M or Form(s) <input type="checkbox"/> 2439 <input type="checkbox"/> 4136 <input type="checkbox"/> 5405 <input type="checkbox"/> 8801 <input type="checkbox"/> 8812 (2009-2011) <input type="checkbox"/> 8839 <input type="checkbox"/> 8863 <input type="checkbox"/> 8885 or <input type="checkbox"/> other (specify):			
15	Total amount paid with request for extension of time to file, tax paid with original return, and additional tax paid after return was filed			
16	Total payments. Add lines 11 through 15			44,686

Refund or Amount You Owe (Note. Allow 8-12 weeks to process Form 1040X.)

17	Overpayment, if any, as shown on original return or as previously adjusted by the IRS	1,009
18	Subtract line 17 from line 16 (If less than zero, see instructions)	43,677
19	Amount you owe. If line 10, column C, is more than line 18, enter the difference	286
20	If line 10, column C, is less than line 18, enter the difference. This is the amount overpaid on this return	
21	Amount of line 20 you want refunded to you	
22	Amount of line 20 you want applied to your (enter year): estimated tax 22	

Complete and sign this form on Page 2.

Part I ExemptionsComplete this part **only** if you are:

- Increasing or decreasing the number of exemptions (personal and dependents) claimed on line 6d of the return you are amending, or
- Increasing or decreasing the exemption amount for housing individuals displaced by a Midwestern disaster in 2009.

See Form 1040 or Form 1040A instructions and Form 1040X instructions.

		A. Original number of exemptions or amount reported or as previously adjusted	B. Net change	C. Correct number or amount
23 Yourself and spouse. Caution. If someone can claim you as a dependent, you cannot claim an exemption for yourself	23			
24 Your dependent children who lived with you	24			
25 Your dependent children who did not live with you due to divorce or separation	25			
26 Other dependents	26			
27 Total number of exemptions. Add lines 23 through 26	27			
28 Multiply the number of exemptions claimed on line 27 by the exemption amount shown in the instructions for line 28 for the year you are amending	28			
29 If you are claiming an exemption amount for housing individuals displaced by a Midwestern disaster, enter the amount from Form 8914, line 6 for 2009	29			
30 Add lines 28 and 29. Enter the result here & on line 4 on page 1 of this form	30			
31 List ALL dependents (children and others) claimed on this amended return. If more than 4 dependents, see instructions.				

(a) First name	Last name	(b) Dependent's social security number	(c) Dependent's relationship to you	(d) Check box if qualifying child for child tax credit (see instructions)
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Part II Presidential Election Campaign Fund

Checking below will not increase your tax or reduce your refund.

- ☐ Check here if you did not previously want \$3 to go to the fund, but now do.
- ☐ Check here if this is a joint return and your spouse did not previously want \$3 to go to the fund, but now does.

Part III Explanation of changes. In the space provided below, tell us why you are filing Form 1040X.

▶ Attach any supporting documents and new or changed forms and schedules.

RECEIVED A NOTIFICATION LETTER CP2057 FOR TAX YEAR 2012. TWO PIECES OF INCOME WERE NOT LISTED ON THE ORIGINAL RETURN. THEY WERE INT INCOME FROM CAP ONE NAT ASSOC OF \$648 AND DIV INCOME FROM NEXTERA ENERGY INC OF \$352. THE OTHER ITEMS LISTED ON THE CP2057 NOTICE WERE REPORTED ON THE ORIGINAL RETURN. THEY WERE INT INC OF \$98 FROM WELLS FARGO AND DIV INC FROM BAYER OF \$1229.

Sign Here**Remember to keep a copy of this form for your records.**

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

▶ Your signature _____ Date _____ ▶ Spouse's signature. If a joint return, **both** must sign. _____ Date _____

Paid Preparer's Use Only

▶ Preparer's signature _____ Date 12-16-2013 KEELEY AND SMITH ACCOUNTING INC
 Firm's name (or yours if self-employed)
 6203 W FAIRFIELD DRIVE
 Pensacola, FL 32506
 Firm's address and ZIP code
 Print/type preparer's name GERARD J KEELEY
P01307257 ☐ Check if self-employed 850-457-1312 59-3483841
 PTIN Phone number EIN