

Filing status: ☐ Single ☒ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

Your first name and initial: **Richard E** Last name: **Neal** Your social security number: [REDACTED]

Your standard deduction: ☐ Someone can claim you as a dependent ☒ You were born before January 2, 1954 ☐ You are blind

If joint return, spouse's first name and initial: **Maureen P** Last name: **Neal** Spouse's social security number: [REDACTED]

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☒ Spouse was born before January 2, 1954 ☒ Full-year health care coverage or exempt (see inst.)

☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street): [REDACTED] Apt. no.: [REDACTED] Presidential Election Campaign (see inst.) ☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. [REDACTED] If more than four dependents, see inst. and check here ☐

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) Check if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

**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.

Joint return? ☐ Your signature: [REDACTED] Date: **04-02-2019** Your occupation: **Member of Congress** If the IRS sent you an Identity Protection PIN, enter it here (see inst.): [REDACTED]

See instructions. Keep a copy for your records. Spouse's signature: If a joint return, both must sign. [REDACTED] Date: **04-02-2019** Spouse's occupation: **Administration** If the IRS sent you an Identity Protection PIN, enter it here (see inst.): [REDACTED]

**Paid Preparer Use Only** Preparer's signature: [REDACTED] PTIN: [REDACTED] Firm's EIN: [REDACTED] Check if: ☒ 3rd Party Designee ☐ Self-employed

Preparer's name: **Robert Calcasola** Firm's name: **Nolan Calcasola & CO PC** Firm's address: **PO Box 625, East Longmeadow, MA 01028**

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Form **1040** (2018)

Form 1040 (2018) Page **2**

<b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2 . . . . .	<b>1</b> <b>189,064</b>
<b>2a</b> Tax-exempt interest . . . . .	<b>2a</b> <b>3,938</b>
<b>3a</b> Qualified dividends . . . . . <b>445</b>	<b>3a</b> <b>598</b>
<b>4a</b> IRAs, pensions, and annuities . . . . . <b>22,624</b>	<b>4a</b> <b>22,031</b>
<b>5a</b> Social security benefits . . . . . <b>46,571</b>	<b>5a</b> <b>39,585</b>
<b>6</b> Total income. Add lines 1 through 5. Add any amount from Schedule 1, line 22 <b>1,233</b> . . . . .	<b>6</b> <b>256,449</b>
<b>7</b> Adjusted gross income. If you have no adjustments to income, enter the amount from line 6; otherwise, subtract Schedule 1, line 36, from line 6 . . . . .	<b>7</b> <b>256,449</b>
<b>8</b> Standard deduction or itemized deductions (from Schedule A) . . . . .	<b>8</b> <b>26,600</b>
<b>9</b> Qualified business income deduction (see instructions) . . . . .	<b>9</b> <b>0</b>
<b>10</b> Taxable income. Subtract lines 8 and 9 from line 7. If zero or less, enter -0- . . . . .	<b>10</b> <b>229,849</b>
<b>11</b> a Tax (see inst.) <b>43,592</b> any from: 1 <input type="checkbox"/> Form(s) 8814 2 <input type="checkbox"/> Form 4972 3 <input type="checkbox"/> ( )	<b>11</b> <b>43,592</b>
b Add any amount from Schedule 2 and check here . . . . .	<b>12</b> <b>0</b>
<b>12</b> a Child tax credit/credit for other dependents . . . . . b Add any amount from Schedule 3 & check here <input type="checkbox"/>	<b>13</b> <b>43,592</b>
<b>13</b> Subtract line 12 from line 11. If zero or less, enter -0- . . . . .	<b>14</b> <b>219</b>
<b>14</b> Other taxes. Attach Schedule 4 . . . . .	<b>15</b> <b>43,811</b>
<b>15</b> Total tax. Add lines 13 and 14 . . . . .	<b>16</b> <b>32,593</b>
<b>16</b> Federal income tax withheld from Forms W-2 and 1099 . . . . .	<b>17</b> <b>0</b>
<b>17</b> Refundable credits: a EIC (see inst.) . . . . . b Sch 8812 . . . . . c Form 8863 . . . . .	<b>18</b> <b>32,593</b>
Add any amount from Schedule 5 . . . . .	<b>19</b> <b>0</b>
<b>18</b> Add lines 16 and 17. These are your total payments . . . . .	<b>20a</b> <b>0</b>
<b>19</b> If line 18 is more than line 15, subtract line 15 from line 18. This is the amount you overpaid . . . . .	<b>21</b> <b>11,464</b>
<b>20a</b> Amount of line 19 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	<b>22</b> <b>11,464</b>
Direct deposit? <input checked="" type="checkbox"/> b Routing number [REDACTED] c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	<b>23</b> <b>246</b>
<input type="checkbox"/> d Account number [REDACTED]	
<b>21</b> Amount of line 19 you want applied to your 2019 estimated tax . . . . . <b>21</b>	
<b>22</b> Amount you owe. Subtract line 18 from line 15. For details on how to pay, see instructions . . . . . <b>22</b>	
<b>23</b> Estimated tax penalty (see instructions) . . . . . <b>23</b>	

**Standard Deduction for-**

- Single or married filing separately. \$12,000
- Married filing jointly or Qualifying widow(er). \$24,000
- Head of household. \$18,000
- If you checked any box under Standard deduction, see instructions.

**SCHEDULE 1**  
**(Form 1040)**

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

**Additional Income and Adjustments to Income**

▶ Attach to Form 1040.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

OMB No. 1545-0074

**2018**

Attachment  
Sequence No. **01**

Richard E & Maureen P Neal

<b>Additional Income</b>	<b>1-9b</b>	Reserved		<b>1-9b</b>	
	<b>10</b>	Taxable refunds, credits, or offsets of state and local income taxes		<b>10</b>	
	<b>11</b>	Alimony received		<b>11</b>	
	<b>12</b>	Business income or (loss). Attach Schedule C or C-EZ		<b>12</b>	
	<b>13</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here	▶ <input checked="" type="checkbox"/>	<b>13</b>	1,233
	<b>14</b>	Other gains or (losses). Attach Form 4797		<b>14</b>	
	<b>15a</b>	Reserved		<b>15b</b>	
	<b>16a</b>	Reserved		<b>16b</b>	
	<b>17</b>	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		<b>17</b>	
	<b>18</b>	Farm income or (loss). Attach Schedule F		<b>18</b>	
	<b>19</b>	Unemployment compensation		<b>19</b>	
	<b>20a</b>	Reserved		<b>20b</b>	
	<b>21</b>	Other income. List type and amount	▶	<b>21</b>	
	<b>22</b>	Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23		<b>22</b>	1,233
<b>Adjustments to Income</b>	<b>23</b>	Educator expenses		<b>23</b>	
	<b>24</b>	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106		<b>24</b>	
	<b>25</b>	Health savings account deduction. Attach Form 8889		<b>25</b>	
	<b>26</b>	Moving expenses for members of the Armed Forces. Attach Form 3903		<b>26</b>	
	<b>27</b>	Deductible part of self-employment tax. Attach Schedule SE		<b>27</b>	
	<b>28</b>	Self-employed SEP, SIMPLE, and qualified plans		<b>28</b>	
	<b>29</b>	Self-employed health insurance deduction		<b>29</b>	
	<b>30</b>	Penalty on early withdrawal of savings		<b>30</b>	
	<b>31a</b>	Alimony paid	<b>b</b> Recipient's SSN ▶	<b>31a</b>	
	<b>32</b>	IRA deduction		<b>32</b>	
	<b>33</b>	Student loan interest deduction		<b>33</b>	
	<b>34</b>	Reserved		<b>34</b>	
	<b>35</b>	Reserved		<b>35</b>	
	<b>36</b>	Add lines 23 through 35		<b>36</b>	0

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

Schedule 1 (Form 1040) 2018



**SCHEDULE 4**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service

Name(s) shown on Form 1040

**Other Taxes**

▶ **Attach to Form 1040.**

▶ **Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.**

OMB No. 1545-0074

**2018**

Attachment  
Sequence No. **04**

Your social security number

**Richard E & Maureen P Neal**

**Other  
Taxes**

<b>57</b>	Self-employment tax. Attach Schedule SE . . . . .	
<b>58</b>	Unreported social security and Medicare tax from: Form <b>a</b> <input type="checkbox"/> 4137 <b>b</b> <input type="checkbox"/> 8919 . . . . .	<b>58</b>
<b>59</b>	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required . . . . .	<b>59</b>
<b>60a</b>	Household employment taxes. Attach Schedule H . . . . .	<b>60a</b>
<b>b</b>	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required . . . . .	<b>60b</b>
<b>61</b>	Health care: individual responsibility (see instructions) . . . . .	<b>61</b>
<b>62</b>	Taxes from: <b>a</b> <input type="checkbox"/> Form 8959 <b>b</b> <input checked="" type="checkbox"/> Form 8960 <b>c</b> <input type="checkbox"/> Instructions; enter code(s) . . . . .	<b>62</b> 219
<b>63</b>	Section 965 net tax liability installment from Form 965-A . . . . . <b>63</b>	
<b>64</b>	Add the amounts in the far right column. These are your <b>total other taxes</b> . Enter here and on Form 1040, line 14 . . . . .	<b>64</b> 219

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

Schedule 4 (Form 1040) 2018

EEA

**SCHEDULE A  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Itemized Deductions**

► Go to [www.irs.gov/ScheduleA](http://www.irs.gov/ScheduleA) for instructions and the latest information.

► Attach to Form 1040.

OMB No. 1545-0074

**2018**

Attachment  
Sequence No. **07**

**Caution:** If you are claiming a net qualified disaster loss on Form 4684, see the instructions for line 16.

Name(s) shown on Form 1040

**Richard E & Maureen P Neal**

<b>Medical and Dental Expenses</b>	<b>Caution:</b> Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see instructions)	1	
2	Enter amount from Form 1040, line 7	2	
3	Multiply line 2 by 7.5% (0.075)	3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	
<b>Taxes You Paid</b>	5 State and local taxes		
	a State and local income taxes or general sales taxes. You may include either income taxes or general sales taxes on line 5a, but not both. If you elect to include general sales taxes instead of income taxes, check this box <input type="checkbox"/>	5a	9,498
	b State and local real estate taxes (see instructions)	5b	
	c State and local personal property taxes	5c	
	d Add lines 5a through 5c	5d	9,498
	e Enter the smaller of line 5d or \$10,000 (\$5,000 if married filing separately)	5e	9,498
	6 Other taxes. List type and amount	6	
	7 Add lines 5e and 6	7	9,498
<b>Interest You Paid</b>	8 Home mortgage interest and points. If you didn't use all of your home mortgage loan(s) to buy, build, or improve your home, see instructions and check this box <input type="checkbox"/>		
<b>Caution:</b> Your mortgage interest deduction may be limited (see instructions).	a Home mortgage interest and points reported to you on Form 1098	8a	
	b 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	8b	
	c Points not reported to you on Form 1098. See instructions for special rules	8c	
	d Reserved	8d	
	e Add lines 8a through 8c	8e	
	9 Investment interest. Attach Form 4952 if required. See instructions	9	
	10 Add lines 8e and 9	10	
<b>Gifts to Charity</b>	11 Gifts by cash or check. If you made any gift of \$250 or more, see instructions	11	
<b>If you made a gift and got a benefit for it, see instructions.</b>	12 Other than by cash or check. If any gift of \$250 or more, see instructions. You <b>must</b> attach Form 8283 if over \$500	12	
	13 Carryover from prior year	13	
	14 Add lines 11 through 13	14	
<b>Casualty and Theft Losses</b>	15 Casualty and theft loss(es) from a federally declared disaster (other than net qualified disaster losses). Attach Form 4684 and enter the amount from line 18 of that form. See instructions	15	
<b>Other Itemized Deductions</b>	16 Other - from list in instructions. List type and amount	16	
<b>Total Itemized Deductions</b>	17 Add the amounts in the far right column for lines 4 through 16. Also, enter this amount on Form 1040, line 8	17	9,498
	18 If you elect to itemize deductions even though they are less than your standard deduction, check here <input type="checkbox"/>		

For Paperwork Reduction Act Notice, see the instructions for Form 1040.

Schedule A (Form 1040) 2018

EEA



**SCHEDULE B**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Interest and Ordinary Dividends**

► Go to [www.irs.gov/ScheduleB](http://www.irs.gov/ScheduleB) for instructions and the latest information.  
► Attach to Form 1040.

OMB No. 1545-0074

**2018**

Attachment  
Sequence No. **08**

Name(s) shown on return

Richard E & Maureen P Neal

Your social security number

**[REDACTED]**

**Part I**  
**Interest**

(See instructions  
and the  
instructions for  
Form 1040,  
line 2b.)

**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.

		Amount
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 the instructions and list this interest first. Also, show that buyer's social security number and address ►	
	<u>CIT Bank</u>	541
	<u>First Republic Bank</u>	124
	<u>Santander Bank</u>	3,273
	<b>INTEREST SUBTOTAL</b>	<b>3,938</b>
2	Add the amounts on line 1 . . . . .	3,938
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 1040, line 2b . . . . .	3,938

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

**Part II**  
**Ordinary Dividends**

(See instructions  
and the  
instructions for  
Form 1040,  
line 3b.)

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

5	List name of payer ►	
	<u>National Financial Services</u>	598
	<b>DIVIDEND SUBTOTAL</b>	<b>598</b>
6	Add the amounts on line 5. Enter the total here and on Form 1040, line 3b . . . . .	598

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

**Part III**  
**Foreign Accounts and Trusts**

(See instructions.)

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.

	Yes	No
7a At any time during 2018, 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), 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 2018, 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

**Net Investment Income Tax-  
Individuals, Estates, and Trusts**

▶ Attach to your tax return.

▶ Go to [www.irs.gov/Form8960](http://www.irs.gov/Form8960) for instructions and the latest information.

OMB No. 1545-2227

**2018**Attachment  
Sequence No. **72**

Name(s) shown on your tax return

Richard E &amp; Maureen P Neal

Your social security number or EIN

**Part I Investment Income**

- ☐ Section 6013(g) election (see instructions)
- ☐ Section 6013(h) election (see instructions)
- ☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions)		1	3,938
2	Ordinary dividends (see instructions)		2	598
3	Annuities (see instructions)		3	
4a	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (see instructions)	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	0
5a	Net gain or loss from disposition of property (see instructions)	5a	1,233	
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	1,233
6	Adjustments 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	5,769

**Part II Investment Expenses Allocable to Investment Income and Modifications**

9a	Investment interest expenses (see instructions)	9a		
b	State, local, and foreign income tax (see instructions)	9b		
c	Miscellaneous investment expenses (see instructions)	9c		
d	Add lines 9a, 9b, and 9c		9d	0
10	Additional modifications (see instructions)		10	
11	Total deductions and modifications. Add lines 9d and 10		11	0

**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	5,769
<b>Individuals:</b>				
13	Modified adjusted gross income (see instructions)	13	256,449	
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	6,449	
16	Enter the smaller of line 12 or line 15		16	5,769
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (.038). Enter here and include on your tax return (see instructions)		17	219
<b>Estates and Trusts:</b>				
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). If zero or less, enter -0-	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 include on your tax return (see instructions)		21	

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

Form **8960** (2018)