<u>104</u>	<b>0</b> t	J.S. Individual Inco	me Tax	Return	2011	ОМВ	No. 1545-0074	IRS Use	Only - I	Do not write or staple in this spa	ICE,
		, 2011, or other tax year beginning		14-147	, 2011, ending		, 20		Se	e separate instructions.	
Your first name	and Initi	at	Last name						You	ur social security number	
WILLAR	-	- God i - Ni-1	ROMN	EY							<u> </u> _
	, spouse	s first name and initial	Last name						эþ	ouse's security non	nber
ANN D	foumher	and street), If you have a P.O. box	ROMN					Apt. no.			
Tionic address	(Hamber	and security in you have all 1.0. bus	, soo manuch	A10.				Apr. IIO.	1	Make sure the SSN(s) a and on line 6c are com	
City, lown or po	ost office	, state, and ZIP code. If you have	a foreign add	ress, also comp	lete spaces below	(see ins	tructions).		-	Presidential Election Campaign	
BELMON'		20 10 10 10 10 10 10 10 10 10 10 10 10 10	02478							ck hiere if you, or your spouse if fling	
Foreign country		444.5	021/0	Foreign prov	ince/county		Foreign postal	code		ly, want \$3 to go to this fund. Check ix below will not altenge your tax or	king
USA										od etc   100   100   100	ouse
Filing Stat	us 1	Single			4	Head	of household (v	vith qualit	_	person) (See Instructions	.) H
i iiiig Otat	2	X Married filing jointly (e	even if only	one had incom	ne)				-120	ot your dependent, enter	•
Check only one	3	Married filing separate	ely. Enter spo	use's SSN ab	ove	child's	name here. 🕨	-	- - A	ALESTER PROPERTY.	
box.		and full name here.	•		5	Qualit	ying widow(er)	with der	end	THE PERSON NAMED IN COLUMN TWO IS NOT THE PERSON NAMED IN COLUMN TWO IS NAMED IN COLUMN TW	
Exemption	s <sup>6a</sup>	X Yourself. If someone	an claim yo	u as a depend	ient, do not che	sck box	6a	Š	## .		2
	b									No. of children on 6c who:	
		Dependents:	l son	(2) Dependent's ial security nun	s (3) [ tber relation	Depende onship to	VOLU ST QUENTY	if child online ng tar child tea	e credit	<ul> <li>lived with you</li> <li>did not live with</li> </ul>	
	(1) Firs	t name Last nam	e				-10° -10°	ige instructions	9	you due to divorce or separation	
If more than four						-	A A	1-	1	(see instructions) —	_
dependents, see instructions and						450		<del>-   -  </del>		Dependents on 6c not entered above	
theck here			100000							_	
	d	Total number of exemptions	s claimed .		- THE	A Printer	words.			Add numbers on lines above	2
Income	7	Wages, salaries, tips, etc. At			- 4500 · · ·	1995		1	7		
income	8 a	Taxable interest. Attach So	hedule B if r	equired	The same				8 a	4,099,156	6.
Attach Form(s)	b	Tax-exempt interest. Do no	t include on	line 8a		8 b					
W-2 here, Also attach Forms	9 a	Ordinary dividends, Attach	Schedule B	f required					9a	3,168,86	7.
W-2G and	b	Qualified dividends	, ,	·	FFMT.1	9 b	1,905,	753.			
1099-R if tax was withheld.	10	Taxable refunds, credits, or offsets of state and local income taxes							10	352,90	5.
	11								11	110 "0	
If you did not	12	Business income or (loss). A	-	"EDM. 1997"				٠٠٠٠	12	110,500	
get a W-2, see instructions.	13	Capital gain or (loss). Attac	44	AND THE PERSON NAMED IN				-	13	10,700,179	
occurrence in the second of th	15a	Other gains or (losses), Atta							14 15b	NO1	NE
		Pensions and annuities	163				e amount		16b		
	17	Rental real estate, revalties		s. S corporati					17	2,830,078	8
Enclose, but do not attach, any	18	Farm income or (loss). Attac	200						18	2,000,01	•
payment. Also, please use	19	Unemployment compensati							19		
Form 1040-V.	20a	Social security benefits	20a		b	Taxable	amount	[	20b		_
	21	Other income. Est type and	amount _	S	EE STATE	MEN	T_1		21	-352,805	5.
<u>~</u>	22	Combine the amounts in th	e far right c	olumn for line	s 7 through 21,	This is	your total inco	ome 🕨	22	20,908,880	٥
Adjusted	2,3	Educator expenses				23			. :		
_	24	Certain business expenses	of reservists,	performing a	rtists, and		0				
Income	PARTIES NO.	fee-basis government offici	als. Attach F	orm 2106 or 2	2106-EZ ,	24					
Gross Income	25	Certain business expenses fee-basis government offici Health savings account dec Moving expenses. Attach Fe	luction. Atta	ch Form 8889							
- C	200	Moving expenses. Attach For					7	805.	1		
	28	Deductible part of self-emp Self-employed SEP, SIMPLE						005.			
	29	Self-employed health insura									
	30	Penalty on early withdrawal								1	
		Alimony paid b Recipient's				31a			3. <sup>3.3</sup>		
	32	IRA deduction				32	2000		9		
	33	Student loan interest deduc		_			te transpor				
	34	Tuition and fees. Attach For									
	35	Domestic production activiti									
	36	Add lines 23 through 35							36	7,805	5.
Fau Direct	37	Subtract line 36 from line 2:	2. This is you	r adjusted g	ross income .				37	20,901,075	
For Disclosure	, Priva	by Act, and Paperwork Redu	iction Act No	otice, see sep	arate instructio	ns.		_		Form: 1040 (20	111)

RS

Tax and Credits  38	y 2, 1947, y 2, 1947, or you were a dual our standard dedu on line 6d, 41. If line 42 is mo Form (s) 8814 Attach Form 6251 red es. Attach Form 24 ech Form 8880  I credits ore than line 46, en from Form; a ment plans, etc. H ch Form 5405 if re  x 2 and 1099 pplied from 2010 fine 10	Blind. Blind. al-status alluction (see	Total che silien, che ee left mine 41, e form 497;	al boxes cked  ck here largin)  onter -0- 2 c 96	39a 39b 2 election NONE	40 41 42 43 44 45 46 55 56 57 58 59a	NON 3, 213, 051 13, 572.
Standard Deduction for -	y 2, 1947, pary 2, 1947, or you were a dual our standard dedu on line 6d, 41, If line 42 is mo Form(s) 8814 Attach Form 6251 ach Form 8880  8801 c ach Form 8880  from Form; a ment plans, etc. H ch Form 5405 if re  x and 1099 polied from 2010  fine 10	Blind. Blind. Blind. Blind. al-status alduction (see	Total che silien, che ee left mine 41, e form 497;	al boxes cked  ck here largin)  onter -0- 2 c 96	39a 39b 2 election NONE	40 41 42 43 44 45 46 55 56 57 58 59a 59b 60	5,688,179 15,212,896 7,400 15,205,496 2,988,626 224,425 3,213,051
b If your spouse itemizes on a separate return Deduction for - People who check any box on line 39a or 39b or who can be claimed as a dependent, see instructions.  All others: Single or Married filing separately, \$5,800  Amount of the see instructions or credit for child and dependent care expensions and separately.  \$5,800  Child tax credit (see instructions).  Child tax	or you were a dual our standard deduction standard deduction standard deduction standard deduction standard deduction standard standard form 6251 and 1 credits or than line 46, end the standard standar	al-status al duction (see than li b February 1997) Attach February 1997	47 48 49 50 51 52 53 64a 65	ck here largin) enter -0- 2 c 96	2 election NONE	41 42 43 44 45 46 55 56 57 58 59a 59b 60	NON 3, 213, 051 13, 572
Deduction for -  People who check any box on fine 39a or 39b or who can be claimed as a dependent, see instructions.  All others: Single or Married filing separately, \$5,800  Married filing pinitly or Qualifying widow(er), \$511,800  Head of household, \$8,500  Head of household, \$8,500  Taxes  Tother	on line 6d 41. If line 42 is mo Form (s) 8814 Attach Form 6251  as. Attach Form 24  ach Form 8880  from Form 8880  from Form; a ment plans, etc. H ch Form 5405 if re  ax  and 1099 pplied from 2010  fine 10	nore than li b F	ee left m ine 41, e orm 497; 47 48 49 50 51 52 53 62 63 64a 66	argin) enter -0- 2 c 96	2 election  NONE	41 42 43 44 45 46 55 56 57 58 59a 59b 60	NON 3, 213, 051 13, 572
for People who here here to be people who here have here to be check any box on line 38 and 380 or who can be claimed as a dependent, see instructions.  All others: Single or Married filing separately, \$5,800  Married filing separately, \$6,800  Married filing s	on line 6d. 41. If line 42 is mo Form (s) 8814 Attach Form 6251  red es. Attach Form 24 ech Form 8880  8801 c  I credits ore than line 46, end ment plans, etc. H ch Form 5405 if red  2 and 1099 pplied from 2010  fine 10	anter -0-	47 48 49 50 51 52 53 64a 65	onter -0- 2 c 96	2 election  NONE	41 42 43 44 45 46 55 56 57 58 59a 59b 60	NON 3, 213, 051 13, 572
box on lime 39a or 39b or who can be claimed as a dependent, see instructions).  All others: Single or Married filing instructions.  All others: Single or Married filing instructions and dependent care expensive separately, \$5,800.  Married filing instructions and the separately, \$5,800.  And the separate	on line 6d. 41. If line 42 is mo Form (s) 8814 Attach Form 6251  red es. Attach Form 24 ech Form 8880  8801 c  I credits ore than line 46, end ment plans, etc. H ch Form 5405 if red  2 and 1099 pplied from 2010  8 line 10	anter -0-	47 48 49 50 51 52 53 62 63 64a	enter -0- 2 c 96	2 election  NONE	42 43 44 45 46 55 56 57 58 59a 59b 60	NON 3, 213, 051 13, 572
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claimed as a dependent, see instructions). Check if any from: a dependent, see instructions.  46 Alternative minimum tax (see instructions) 46 Add lines 44 and 45	Attach Form 6251  red  as. Attach Form 24  ach Form 8880  8801 c  I credits  bre than line 46, en  ment plans, etc.  H  ch Form 5405 if re  ach Form 5405 if re  policy  policy from 2010  fine 10	441 441 4137 Attach Fe	47 48 49 50 51 52 53  b 5329 62 63 64a	Jeg 19 If required	NONE	44 45 46 46 55 56 57 58 59a 59b 60	2,988,626 224,425 3,213,051 NON 3,213,051 13,572
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Add lines 44 and 45  All others: Single or Married filing separately, \$5,800  Married filing singly or Coualifying widow(er), \$11,800  Head of household, \$8,800  Differ  Faxes  Other  Self-employment tax Attach Schedule SE  Unreported social security and Medicare tax 84 Additional tax on IRAs, other qualified retires 59a Household employment taxes from Schedule b First-time homebuyer credit repayment. Attach Schedule EIC.  Other taxes Enter code(s) from instructions 61 Additional child tax credit (EIC)  Nontaxable combat pay election 64 Administration of First-time homebuyer credit from Form 886  Additional child tax credit (EIC)  Nontaxable combat pay election 65 Administration of First-time homebuyer credit from Form 886  Amount paid with request for extension to file Excess social security and file of extension to	as. Attach Form 24 ach Form 8880  8801 c  8801 c  I credits bre than line 46, en ment plans, etc. H ch Form 5405 if re  2 and 1099 pplied from 2010 bline 14	441 Attach Forequired	47 48 49 50 51 52 53 64 62 63 64a	Jeg 19 Mrequired	NONE	54 55 56 57 58 59a 59b 60	NON 3, 213, 051 13, 572
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58 Additional tax on IRAs, other qualified retire 59a Household employment taxes from Schedule b First-time homebuyer credit repayment. Atta 60 Other taxes. Enter code(s) from instructions 61 Add lines 55 through 60. This is your total tax 62 Federal income tax withheld from Forms W- 63 2011 estimated tax payments and amount a 64a Earned income credit (EIC)  b Nontaxable combat pay election 65 Additional child tax credit. Attach Form 886: 66 American opportunity credit from Form 886: 67 First-time homebuyer credit from Form 886: 68 Amount paid with request for extension to fill 69 Excess social security and tier 1 RRTA tax with the form 65 through 71. The fund 70 Credit for federal tax on fuels. Attach Form 4 71 Credits from Form: a 2439 b 8839 72 Add lines 62, 63; 64a, and 65 through 71. The fund 73 If line 72 is more than line 61, subtract line 74a Amount of line 73 you want refunded to your rect deposit? b Routing number 65 Amount of line 73 you want applied to your mount 76 Amount of line 73 you want applied to your mount 76 Amount you owe. Subtract line 72 from line 77 Estimated tax penalty (see instructions).	ment plans, etc. / H	Attach For	62 63 64a	) (frequired		58 59a 59b 60	3,226,623
59a Household employment taxes from Schedule b First-time homebuyer credit repayment. Atta 60 Other taxes. Enter code(s) from instructions 61 Add lines 55 through 60. This is your total tax 62 Federal income tax withheld from Forms W- 63 2011 estimated tax payments and amount at a gualifying 64 Earned income credit (EIC) 65 Nontaxable combat pay election 66 Additional child tax credit. Attach Form 8812 66 American opportunity credit from Form 8863 67 First-time homebuyer credit from Form 8863 68 Amount paid with request for extension to the first from Form: a 2439 b 8839 70 Credit for federal tax on fuels. Attach Form 4 71 Credits from Form: a 2439 b 8839 72 Add lines 62, 63, 64a, and 65 through 71. The fund 73 If line 72 is note than line 61, subtract line 74a Amount of line 73 you want refunded to you rect deposit? b Routing number 75 Amount of line 73 you want applied to your 76 Amount you owe. Subtract line 72 from line ou Owe 77 Estimated tax penalty (see instructions).	H. ich Form 5405 if re 2 and 1099 pplied from 2010 file 14	Leturn	62 63 64a	*		59a 59b 60	3,226,623.
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Add lines 55 through 60. This is your total to some factor of the solution of	pplied from 2010 by line 14	Ledum	62 63 64a			60	3,226,623
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structions.  d Account number  75 Amount of line 73 you want applied to your  76 Amount you owe. Subtract line 72 from line  70 Owe  77 Estimated tax penalty (see instructions)	If Form 8888 is a	attached,	check h	ere	<b>▶</b>	74a	10,000
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ou Owe 77 Estimated tax penalty (see instructions)	61. For details or	n how to p	pay, see			76	
The total and the second secon			77		0.00000		
hird Party Do you want to allow another person to discus				ctions)? X	Yes, Com	plete h	elow. No
		, , ,	Phone				
DANIEL P. FEHELEY			no, 🕨			num	onal identification
ign Under penalties of perjury, I declare that I have exam	ined this return and a	accompany or then four	ying sche	dules and sta	lements, and	o the h	ort of my knowledge and
Your signature	Date	er eren raxp	Your	occupation	EXIMISION OF W	Daytin	parer has any knowledge. ne phone number
oint return? See			EXE	CUTIV	e.		100 mars -
sindculors.  Spouse's signature, If a joint return, both must sign.	Date			se's occupati		If the IR	Sent you an Identity Protection
our records,				IEMAKEI		(see insi	er it here
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ald	ignature				Checki self-employed		
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Jse Only Firm's name ► PRICEWATERHOUSE Firm's address ► 125 HIGH STREET		TD			F		
	COOPERS L	LP			Firm's EIN		
BOSTON 32.000	COOPERS L	ĻΓΡ		IA 0211	Phone no.		

#### SCHEDULE A (Form 1040)

# **Itemized Deductions**

OMB No. 1545-0074

2011 Attachment

Department of the Treasury Internal Revenue Service (99)

Attach to Form 1040.

See Instructions for Schedule A (Form 1040).

Name(s) shown o	n F	orm 1040	T.,	Sequence No. 07
WILLARD M		ROMNEY & ANN D ROMNEY	You	ur social security number.
Medical and Dental Expenses	1 2 3 4	Caution. Do not include expenses reimbursed or paid by others.  Medical and dental expenses (see instructions)  Enter amount from Form  1040, line 38  Multiply line 2 by 7.5% (.075)  Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	
Paid	5 6 7 8	State and local (check only one box):  a X Income taxes, or b General sales taxes  Real estate taxes (see instructions) 6 226, 356.  Personal property taxes 7 146.  Other taxes. List type and amount >	9	1 5/19 596
Interest 10 You Paid 10	1	Home mortgage interest and points reported to you on Form 1098 10  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 ▶	9	1,549,596.
Note. Your mortgage interest 12 deduction may be limited (see 13 instructions).	1	Points not reported to you on Form 1098. See instructions for special rules  Mortgage insurance premiums (see instructions)  Investment interest, Attach Form 4952 if required. (See instructions.)  Add lines 10 through 14	15	STMT 4 46,033.
Gifts to 16 Charity  If you made a gift and got a benefit for it, 18 see instructions. 19	,	Gifts by cash or check. If you made any gift of \$250 of more, see instructions. SEE STATEMENT 4. 16 3,100,000.  Other than by cash or check. If any giff of \$250 of more, see instructions. You must attach Form \$283 it over \$500. 17 920,572.  Carryover from prior year 18	19	STMT 4 4,020,572.
Casualty and Theft Losses 20		Casualty or theft loss or Attack Town 1994 (Casimaton)		
27	(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See instructions.)  Tax preparation fees  Other expanses - investment, safe deposit box, etc. List type and amount  SEE STATEMENT 5  Add lines 21 through 23  Enter amount from Form 1040, line 38	27	71,978.
Other 28 Miscellaneous	(	Other - from list in instructions. List type and amount		
Total 29 Itemized Deductions 30	1	Add the amounts in the far right column for lines 4 through 28. Also, enter this amount	28	5,688,179.

For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule A (Form 1040) 2011

### SCHEDULE B

(Form 1040A or 1040)

# Interest and Ordinary Dividends

Attach to Form 1040A or 1040.

See instructions on back.

OMB No. 1545-0074

Department of the Treasury Internal Revenue Service (99) Attachment Sequence No. 08 Name(s) shown on return Your social security number WILLARD M ROMNEY & ANN D ROMNEY Part I List name of payer. If any interest is from a seller-financed mortgage and the Amount buyer used the property as a personal residence, see instructions on back and list Interest this interest first. Also, show that buyer's social security number and address > (See instructions on back and the instructions for Form 1040A, or Form 1040, 4,099,156. line 8a.) Note. If you received a Form 翻進 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 2 Add the amounts on line 1 4,099,156. 2 shown on that 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. form. 4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 3 4 4,099,156. Note, If line 4 is over \$1,500, you must complete Part'ill. Amount Part II 5 List name of payer ▶ ABBOTT LABORATORIES 172. Ordinary METLI FE 2,122. Dividends METLIFE 579. (See instructions W MITT ROMNEY 1996 CROT TO BRADFORD 88. on back and the THE ANN AND MITT ROMNEY 1995 FAMILY 1,469,483. instructions for THE W. MITT ROMNEY BLAND TRUST 415,623. Form 1040A, or THE ANN D. ROMNEY BLIND TRUST Form 1040, 280,800. line 9a.) Note. If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary Add the amounts on line 5. Enter the total here and on Form 1040A, or Form dividends shown 3, 168, 867. on that form Note If line 6 is over \$1,500, you must complete Part III. 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 Part III 7a At any time during 2011, did you have a financial interest in or signature authority over a financial Foreign account (such as a bank account, securities account, or brokerage account) located in a foreign Accounts X and Trusts If "Yes," are you required to file Form TD F 90-22.1 to report that financial interest or signature (See authority? See Form TD F 90-22.1 and its instructions for filing requirements and exceptions to instructions on X back.) b If you are required to file Form TD F 90-22.1, enter the name of the foreign country where the financial account is located > 8 During 2011, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions on back Х

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

Schedule B (Form 1040A or 1040) 2011

1A1600 1.000 \* INCLUDES, 639, 021. OF US TREAS OBLIGATION INT. FROM SCH K-1 SOURCES

#### SCHEDULE C (Form 1040)

Department of the Treasury

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 Attachment Sequence No. 09

Schedule C (Form 1040) 2011

Internal Revenue Service (99) Name of proprietor Social security number (SSN). WILLARD M ROMNEY Principal business or profession, including product or service (see instructions) B Enter code from instructions INDEPENDENT ARTISTS, WRITERS, PERFORMERS 711510 Business name, If no separate business name, leave blank, D Employer ID number(EIN), (see instr.) AUTHOR/SPEAKING FEES Business address (including suite or room no.) City, town or post office, state, and ZIP code Accounting method: (1) X Cash (2) Other (specify) > Accrual (3) Did you "materially participate" in the operation of this business during 2011? If "No," see instructions for limit on losses Ġ No Н X No X No Part I Income 1 a Merchant card and third party payments, For 2011, enter -0-Gross receipts or sales not entered on line 1a (see instructions) 500學時 Income reported to you on Form W-2 if the "Statutory Employee" box on that form was checked. Caution. See instr. before completing this line. 1đ 110,500. 2 Subtract line 2 from line 1d 2 110,500. 3 4 Gross profit, Subtract line 4 from line 3 5 110,500. Other income, including federal and state gasoline or fuel tax credit of refund (see instructions) 6 7 110,500. Part | Expenses Enter expenses for business use of your home only on line 30. 8 Office expense (see instructions) 18 Pension and profit-sharing plans . . . . Car and truck expenses (see 19 19 20 instructions)....... Rent or lease (see instructions): Commissions and fees 10 10 Vehicles, machinery, and equipment 20 a Other business property Contract labor (see instructions) 11 11 20b 12 12 21 Repairs and maintenance 21 13 Depreciation and section 179 Supplies (not included in Part III) . . . . 22 22 expense deduction Taxes and licenses 23 23 included in Part III) instructions) . . . . . . . . . . . . 24 Travel, meals, and entertainment: 14 Employee benefit programs: 24a (other than on line 19), 48 Deductible meals and Insurance (other than healthis, . 15 15 entertainment (see instructions) 24b 16 Interest: Utilities........... 25 Mortgage (paid to banks, etc.) . . Wages (less employment credits). . . . 16a 26 26 Other expenses (from line 48) . . . . . 27a Other . ... 16b 27 a Legal and professional services 17 27 b Total expenses before expenses for business use of home. Add lines 8 through 27a 28 28 Tentative profit or (loss). Subtract line 28 from line 7 29 500 29 110. Expenses for business use of your home. Attach Form 8829. Do not report such expenses elsewhere 30 30 31 Net profit or (loss). Subtract line 30 from line 29. If a profit, enter on both Form 1040, line 12 (or Form 1040NR, line 13) and on Schedule SE, line 2. If you entered an amount on line 1c, see instr. Estates and trusts, enter on Form 1041, line 3. 31 If a loss, you must go to line 32. 110,500. If you have a loss, check the box that describes your investment in this activity (see instructions). 32 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 entered an amount on line 1c, see the instructions for line 31, 32a All investment is at risk. Estates and trusts, enter on Form 1041, line 3. 32b Some investment is not If you checked 32b, you must attach Form 6198. Your loss may be limited. For Paperwork Reduction Act Notice, see your tax return instructions.

	till Cost of Goods Sold (see instructions)
e II	Total Cook (See Michigania)
	Method(s) used to value closing inventory:  a Cost b Lower of cost or market c Other (attach explanation)
	Was there any change in determining quantities, costs, or valuations between opening and closing inventory?
	If "Yes," attach explanation Yes X
	Inventory at beginning of year. If different from last year's closing inventory, attach explanation 35
	35
	Purchases less cost of items withdrawn for personal use
	Cost of labor. Do not include any amounts paid to yourself
	Materials and supplies 38
	Other costs
	Add lines 35 through 39
	Add lines 35 through 39
	Inventory at end of year 41
	Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on line 4
311	Information on Your Vehicle. Complete this part only if you are claiming car or truck expenses on line 9
	and are not required to file Form 4562 for this business. See the instructions for line 13 to find out if you must
_	file Form 4562.
	When did you place your vehicle in service for business purposes? (month, day, year)
	Tribit and you place your vernale in activities for boostiess purposes; (mone), day, year)
	Of the total number of miles you drove your vehicle during 2011, enter the number of miles you used your vehicle for:
а	Business b Commuting (see instructions) c Other
	Was your vehicle available for personal use during off-duty hours?
	Do you (or your spouse) have another vehicle available for personal use?
	Do you (or your spouse) have another vehicle available for personal use?
а	Do you have evidence to support your deduction 4
b	If "Yes," is the evidence written?
ılı,	tV Other Expenses. List below business expenses not included on lines 8-26 or line 30.
<b>.</b>	
	<i>A</i> (3-)
_	
	Total other expenses. Enter here and on line 27a

1X0120 2.000

#### SCHEDULE D (Form 1040)

Department of the Treasury Internal Revenue Service (99)

# Capital Gains and Losses

➤ Attach to Form 1040 or Form 1040NR.

► See Instructions for Schedule D (Form 1040).

► Use Form 8949 to list your transactions for lines 1, 2, 3, 8, 9, and 10.

2011 Attachment 12

Name(s) shown on return
WILLARD M ROMNEY & ANN D ROMNEY

Your social security number

Par	Short-Term Capital Gains and Losses - Asse	ets Held One Yea	ar or Less		_	
This	plete Form 8949 before completing line 1, 2, or 3. form may be easier to complete if you round off cents to e dollars.	(e) Sates price from Form(s) 8949, line 2, column (e)	(f) Cost or other basis from Form(s) 8949, line 2, column (f)	(g) Adjustments gain or loss fro Form(s) 8949 line 2, column (	m ,	(h) Gain or (loss) Combine columns (e), (f), and (g)
1	Short-term totals from all Forms 8949 with box A checked in Part I		( )			The same of the sa
2	Short-term totals from all Forms 8949 with box B checked in Part I		(	,499a,	-	STATE OF THE PARTY
3	Short-term totals from all Forms 8949 with box C checked in Part I,		( )		E STATE OF THE STA	ъ.
4 5	Short-term gain from Form 6252 and short-term gain of Net short-term gain or (loss) from partnerships Schedule(s) K-1	s, S corporation	ns, estates, and	trusts from	<b>4</b>	166,224. 923,858.
6	Short-term capital loss carryover. Enter the amount, if	any, from line 8	of your Capital Los	Carryover	_	,
7	Worksheet in the instructions  Net short-term capital gain or (loss). Combine line long-term capital gains or losses, go to Part II below. Other	es 1 through 6 H	n columna (ha); it wo	u have anv	7	1,090,082.
Par			AF 22		5-6-55	
This	plete Form 8949 before completing line 8, 9, or 10. form may be easier to complete if you round off cents to e dollars.	(e) Sales price from Form(s) 8949, line 4, column (e)	(f) Cost or other basis from Form(s) 8949, line 4, column (f)	(g) Adjustments gain or loss fror Form(s) 8949, line 4, column (	m:	(h) Gain or (loss) Combine columns (e), (f), and (g)
8	Long-term totals from all Forms 8949 with box A checked in Part II		( )		3/	
9	Long-term totals from all Forms 8949 with box B checked in Part II	All .	( )			
10	Long-term totals from all Forms 8949 with box C checked in Part II	A Property of the Control of the Con	( )	791486	92 00	
11	Gain from Form 4797, Part I; long-term gain from For from Forms 4684, 6781, and 8824		52; and long-term g	ain or (loss)	11	250,247.
12	Net long-term gain or (loss) from partnerships, S corp	orations, estates, a	and trusts from Scho	edule(s) K-1	12	9,320,634.
13	Capital gain distributions. See the instructions				13	39,216.
14	Long-term capital loss carryover. Enter the amount, if Worksheet in the instructions		of your Capital Loss		14	(
15	Net long-term capital gain or (loss). Combine lines 8 the back	through 14 in col	umn (h). Then go to	Part III on	15	9,610,097.
For F	aperwork Reduction Act Notice, see your tax return ins	structions.				e D (Form 1040) 2011

No. Complete the rest of Form 1040 or Form 1040NR.

Pa	t II Summary		
16	Combine lines 7 and 15 and enter the result	16	10700179.
	<ul> <li>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.</li> </ul>		
	<ul> <li>If line 16 is a loss, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> </ul>		
	<ul> <li>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.</li> </ul>		
17	Are lines 15 and 16 both gains?		
	X Yes. Go to line 18.		
	No. Skip lines 18 through 21, and go to line 22.		Weine.
18	Enter the amount, if any, from line 7 of the 28% Rate Gain Worksheet in the instructions	18	
19	Enter the amount, if any, from line 18 of the Unrecaptured Section 1250 Gain Worksheet in the instructions	19	
20	Are lines 18 and 19 both zero or blank?  X Yes. Complete Form 1040 through line 43, or Form 1040NR through line 41. Then complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44 (or in the instructions for Form 1040NR, line 42). Do not complete lines 21 and 22 below.		
	No. Complete Form 1040 through line 43, or Form 1040NR through line 41. Then complete the Schedule D Tax Worksheet in the instructions. Do not complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the smaller of:	2120000 2312675 252308	
	The loss on line 16 or	21	(
	• (\$3,000), or if married filing separately (\$1,500)		
	Note, When figuring which amount is smaller, treat both amounts as positive numbers.	3,000 kg 20,000 kg	35684 2561961.63 55627 2564
22	Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?  Yes, Complete Form 1040 through line 43, or Form 1040NR through line 41. Then 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).		

Schedule D (Form 1040) 2011

## SCHEDULE E (Form 1040)

Supplemental Income and Loss (From rental real estate, royalties, partnerships,

S corporations, estates, trusts, REMICs, etc.)

OMB No. 1545-0074 Attachment

Department of the Treasury Internal Revenue Service (99)

Attach to Form 1040, 1040NR, or Form 1041. ▶ See separate instructions.

Sequence No.

Name(s) shown on return	-				Yours	ocial security nu	mber
WILLARD M ROMNEY & ANN D ROMNEY							
A Did you make any payments in 2011 that would require	you to file	Form(s)	1099? (see in	structions)	-	Yes	No
B If "Yes," did you or will you file all required Forms 1099?		,		,		Yes	No
Part I Income or Loss From Rental Real Estate an	nd Royalti	es Note	If you are in th	e husiness of re	enting pers		
Schedule C or C-EZ (see instructions). If you are an in	ndividual, rei	port farm r	ental income o	or loss from For	m 4835 o	n nane 2 line 4	in in
Caution. For each rental property listed on line 1, check the				The second secon			
qualified joint venture (QJV) reporting income not subject to	o self-emple	ovment ta	IX.	d owned mat	property a	as a flietudet o	па
			or each renta	al real	Cair Pon	tal Personal	
Physical address of each property-street, city, state, zip	belov	е	state proper	ty listed,	4	SE PARTITION TO SE	QJV
A THE AND ACTOR DOLLARS 1005 DA			eport the nun	nber of	Days	Use Days	
A THE ANN AND MITT ROMNEY 1995 FA		u	ays rented a alue and day	t fair rental A	47 43	485	
B   C		p	ersonal use.	Cna 1,5	Action Actions	765 gr	
	77.70		nstructions.	See C			
Type of Property:				4	400 五		
1 Single Family Residence 3 Vacation/Short-Term Rental 5	Land		7 Self-Renta	.n957 YSA	29		
	Royalties		8 Other (des	325	(Eggs)		
Income:			्रांगे	Properties			
27			A	₩B		С	
3 a Merchant card and third party payments. For 2011, enter -0-			The A				
b Payments not reported to you on line 3a	3b	L.,	A COM	A CONTRACTOR OF THE PARTY OF TH			
4 Total not including amounts on line 3a that are not		4		9			
income (see instructions)	4	. A.	6,848.		55000 185 19		
Expenses:		asia.	Williams.		8		
5 Advertising	5,	Develop Develop	"ft»				
6 Auto and travel (see instructions)		1000 M	[1]	6363			
7 Cleaning and maintenance	A 10000	m. 1	2000			100	
8 Commissions		W. AND IN	200000 T	E 100 TE	77.7		
9 Insurance	100	20		(A) (A)			
10 Legal and other professional fees	4 900		142.54		1000		
11 Management fees	# 11			7.5.5			
12 Mortgage interest paid to hanks etc (see instructions)	12			7-7-11			
13 Other interest	13						
14 Repairs	14						
	15	-			-		
一					100000	22	
16 Taxes				10.200			
17 Utilities	18			1000	-		
18 Depreciation expense or depletion	40	7,00	7000				
19 Other (list) >	19						
20 Total expenses. Add lines 5 through 19	20						
21 Subtract line 20 from time 4. If result is a (loss), see							
instructions to find out if you must file Form 6198	21		6,848.		_		
22 Deductible rental real estate loss after limitation, if any,		,					
on Form 8582 (see instructions)			)	(	)(		)
23a Total of all emounts reported on line 3a for all rental properties							
b Total of all amounts reported on line 3a for all royalty properties							
c Total of all amounts reported on line 4 for all rental properties.			23c	100000			
d Total of all amounts reported on line 4 for all royalty properties.			23d	6,	848.		
e Total of all amounts reported on line 12 for all properties			23e				
f Total of all amounts reported on line 18 for all properties				100.00		4.0	
g Total of all amounts reported on line 20 for all properties				329723	7-2		
24 Income. Add positive amounts shown on line 21. Do not include					24	6,	848.
25 Losses. Add royalty losses from line 21 and rental real estate l							)
26 Total rental real estate and royalty income or (loss).							
If Parts II, III, IV, and line 40 on page 2 do not apply t	o you, also	enter this	s amount on	Form 1040, li	ne		
17, or Form 1040NR, line 18. Otherwise, include this amount in	n the total or	line 41 or	n page 2		. 26	6.	348.
For Paperwork Reduction Act Notice, see your tax return instructi						le E (Form 104	

Schedule E (Form 1040) 2011 Attachment Sequence No. 13 Name(s) shown on return. Do not enter name and social security number if shown on other side. Your social security number WILLARD M ROMNEY & ANN D ROMNEY Caution. The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1, Income or Loss From Partnerships and S Corporations Note. If you report a loss from an at-risk activity for which Part II any amount is not at risk, you must check the box in column (e) on line 28 and attach Form 6198. See instructions. Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? If you answered "Yes," see instructions before completing this section. (b) Enter P for (c) Check if (d) Employer (e) Check if 28 (a) Name foreign partnership; S identification any amount is partnership for S corporation number not at risk INTERCONTINENTAL REAL ESTATE INVESTM ROB ROM ENTERPRISES LLC Ρ С D Passive Income and Loss Nonpassive Income and Loss (f) Passive loss allowed (attach Form 8582 if required) (g) Passive income (h) Nonpassive loss (j) Nonpassive income (i) Section 179 expense from Schedule K-1 from Schedule K-1 from Schedule K-1 deduction from Form 4562 1,429. Α В NONE Ċ D 1,429. 29a Totals 30 Add columns (g) and (j) of line 29a 1,429. 30 Add columns (f), (h), and (i) of line 29b 31 32 Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below . . . . . . . . 32 Income or Loss From Estates and Trusts Part III (b) Employer 33 (a) Name identification number Α SEE STATEMENT 11 В

_\$	TMT 12 Passive Income and Loss Nonpassive In	come a	and Loss STMT 13
	(c) Passive deduction or loss allowed (d) Passive income (e) Deduction or loss from Schedule K-1 from Schedule K-1		(f) Other Income from Schedule K-1
АВ		1	
_	Totals 2,625,388.		197,624.
b	Totals -1,211-	75 75	<u> </u>
35	Add columns (d) and (f) of line 34a	35	2,823,012.
36	Add columns (c) and (e) of line 34b	36	( 1,211.
37	Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and		
	include in the total on line 41 below	. 37	2,821,801.
Pa	rt IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residu	al Hol	

37	Total estate and trust income of	or (ligss). Combine lines 35	and 36. Enter the result her	e and		
	include in the total of line 41 be	slow			37	2,821,801.
Pa	art IV Income or Loss Fi	om Real Estate Mort	gage Investment Con	duits (REMICs) - Residua	l Hol	
38	(a) Name	(b) Employer (dentification number	(c) Excess inclusion from Schedules Q, line 2c (see instructions)	(d) Taxable income (net loss) from Schedules Q, line 1b		(e) Income from Schedules Q, line 3b
.00	F Management					
39	Combine columns (d) and (e) or	nly. Enter the result here a	and include in the total on line	9 41 below	39	
	art V Sümmary					1980.00
40	Net farm rental income or (loss)	from Form 4835, Also, cor	mplete fine 42 below		40	
41	Total income or (loss). Combine li	nes 26, 32, 37, 39, and 40. Enter	the result here and on Form 1040, li	ie 17, or Form 1040NR, line 18	41	2,830,078.
42	Reconciliation of farming farming and fishing income re (Form 1065), box 14, code B U; and Schedule K-1 (Form 1041 Reconciliation for real estate professional (see instructions), anywhere on Form 1040 or Form which you materially participal	eported on Form 4835, I ; Schedule K-1 (Form 11 ), line 14, code F (see instre e professionals. If you enter the net income or rm 1040NR from all renta	ine 7; Schedule K-1 20S), box 17, code ructions)4 were a real estate r (loss) you reported I real estate activities	2		

Schedule E (Form 1040) 2011

#### SCHEDULE SE (Form 1040)

# Self-Employment Tax

See separate instructions.

Debat	riment of t	ne Tressu	ry į	_
Intern	al Revenus	a Service	(99)	•

Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074 Attachment Sequence No.

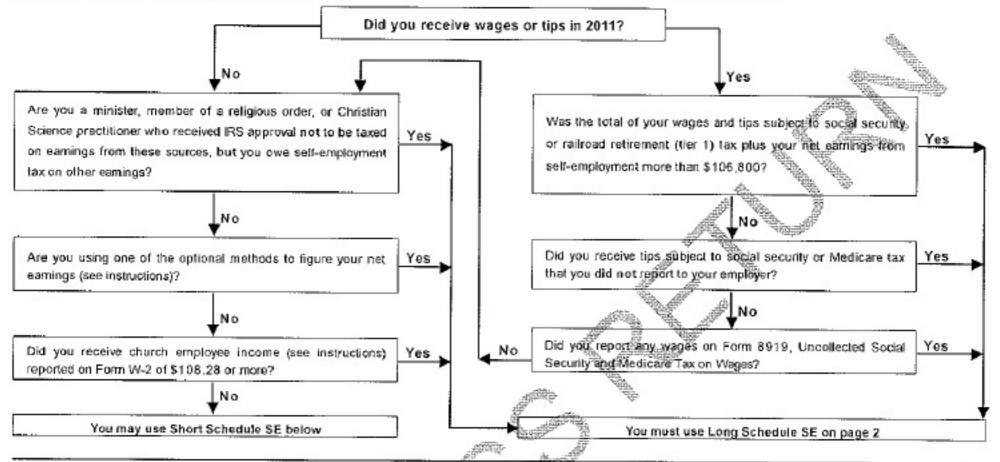
WILLARD M ROMNEY

Name of person with self-employment income (as shown on Form 1040) Social security number of person with self-employment income >

Before you begin: To determine if you must file Schedule SE, see the instructions.

# May I Use Short Schedule SE or Must I Use Long Schedule SE?

Note. Use this flowchart only if you must file Schedule SE. If unsure, see Who Must File Schedule SE in the instructions.



# Section A - Short Schedule SE. Caution, Read above to see if you can use Short Schedule SE.

1a	Net farm profit or (loss) from Schedule F. line 34 and farm partnerships, Schedule K-1 (Form			
	1065), box 14, code A	1a		
b	If you received social security retirement or disability benefits, enter the amount of Conservation Reserve			
	Program payments included on Schedule Filine 4b, or listed on Schedule K-1 (Form 1065), box 20, code Y	4.	,	,
	771 749	1b	(	
2	Net profit or (loss) from Schedule @ 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 SEE STATEMENT 14	2		110,500.
3	Combine lines to the And 2			
4	Combine lines 1a, 1b, and 2.	3		110,500.
4	Multiply line 3 by 92,35% (.9235). If less than \$400, you do not owe self-employment tax, do			
	not file this schedule unless you have an amount on line 1b	4		102,047.
	Note. If line 4 is less than \$400 due to Conservation Reserve Program payments on line 1b.	100		
	see instructions.			
5	Self-employment tax. If the amount on line 4 is:			
	<ul> <li>\$106 800 or less, multiply line 4 by 13.3% (.133). Enter the result here and on Form 1040, line 56,</li> </ul>	1		
	or Form 1040NR, line 54			
	<ul> <li>More than \$106,800, multiply line 4 by 2.9% (.029). Then, add \$11,107.20 to the result.</li> </ul>			
	74.			
_	Enter the total here and on Form 1040, line 56, or Form 1040NR, line 54	5		13,572.
6	Deduction for employer-equivalent portion of self-employment tax.			
	If the amount on line 5 is:			
	\$14,204.40 or less, multiply line 5 by 57.51% (.5751)			
	More than \$14,204.40 multiply line 5 by 50% (.50) and add			
	\$1,067 to the result.			
	Enter the result here and on Form 1040, line 27, or Form			
	1040NR, line 27			and the second second

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

Schedule SE (Form 1040) 2011

THE TAXPAYERS EXPECT TO HAVE A FOREIGN TAX CREDIT IN 2011; HOWEVER INFORMATION IS NOT CURRENTLY AVAILABLE OR ESTIMABLE AT THIS TIME.

Foreign Tax Credit

(Individual, Estate, or Trust)

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

Department of the Treasury Internal Revenue Service (99)

► See separate instructions.

Attachment Sequence No. 19

OMB No. 1545-0121

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 III Journal of the foreign country or U.S. possession, use a segarate column and line for each country or possession.  Foreign Country or U.S. possession, use a segarate column and line for each country or possession.  Foreign Country or U.S. possession.  Total  A B C C Add cols A B, and C.)  Possession B C Radd cols A B, and C.)  Possession B C Radd cols A B, and C.)  Possession C Radd cols A B, and C.)  Posses	Nar	me WILLARD N		ΞY					Identifying	number as si	hown	on page 1 of your tax return
Form 115. Report all amounts in U. S. dollars except where specified in Part II below.  a					69							
Passive category income    Passive category income   Certain income re-sourced by treaty	Ųs€	e a separate Form 1	116 for each	h category of in	come listed b	pelow. See Categor	ies of Incom	ne in the inst	ructions. Ch	eck only one	box :	on each
B. Goneral category income  d		_	amounts in I	U.S. dollars ex	cept where sp	pecified in Part II be	low.					
Resident of (name of country)   WITTD STATES     Note: If you paid takes to only one foreign country or U.S. possession, use column A in Part I and line A in Part III III you had takes to more than one foreign country or U.S. possession, use a superate column and line for each country or possession.     Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)	a	X Passive catego	ory income	с	Section 90	01(j) income		e	Lump-sun	n distribution	S	
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 III Journal Land line A in Part III Journal Land line A in Part III Land line A in P	b į	General categ	ory income	d	Certain in	come re-sourced b	y treaty					
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 III Journal Land line A in Part III Journal Land line A in Part III Land line A in P												AĜ.
Taxable Income or Loss From Sources Outside the United States (for Category Chacked Above)    Total Category Chacked Above	f I	Resident of (name of	f country)	► UNITED	STATE	ES					19092	All The Control of th
Enter the name of the foreign country or U.S. possession	No:	te: If you paid tax	res to only	one foreign	country of	r U.S. possessioi	n, use colu	mn A in P	art I and Ii	ne A in Pa	art 4£	If you paid taxes to
Foreign Country or U.S. Possession Total  A B C  (Add cols A. B. and C.)  PARICUS COUNTRIES    A B C C (Add cols A. B. and C.)    A Cols incense from source within country shown above and of the type checked above gene instructions;											States.	With the second
g Enter the name of the foreign country or U.S. possession.  1a Goss income from sources while Country shown above and of the type checked above gree instructions).  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 base, to determine its source (see instructions).  Deductions and losses (Caudon: See instructions).  2 Expenses definitely related to the income on line 1a (attach statement).  3 Pror atta share of other deductions not definitely related.  4 Cardon: See instructions).  5 Prof and share of other deductions or standard deduction (see instructions).  6 Add lines 3 and 3b.  6 Other ceductions (attach statement).  7 Prof and share of other deductions or standard deduction (see instructions).  8 Most Sories foreign source (see instructions).  9 Wolltiply line 3 of by line 3f.  14 Fro rata share of interest expense (see instructions).  9 Molltiply line 3 of by line 3f.  15 Losses from from all sources (see instructions).  15 Losses from frogin sources (see instructions).  16 Differ interest expense.  17 None  18 Add lines 2, 3g, 48-db, and 5.  18 Add lines 2, 3g, 48-db, and 5.  19 Differ interest expense.  19 Differ foreign faxes paid or Accrued (see instructions).  19 Other interest expense.  10 Differ foreign faxes paid or Accrued (see instructions).  19 Other interest expense.  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ foreign faxes paid or Accrued (see instructions).  10 Differ forei	Pε	Taxable	Income	or Loss Fro	m Source	es Outside the	United Sta	ates (for C	ategory C	hecked A	bov	e) 🔍
processession.  a Goss income from source which country are not personal above and of the type checked above goe instructions and losses (Caudion: See instructions).  b Check if line 1s is compensation for personal services as an employee, cour total compensation from all sources is \$250,000 or more, and you used an atternative basis to determine its source (see instructions).  2 Expenses definitely related to the income on line ta (attent statement).  3 Pro rate share of other deductions not definitely related:  a Certain itemized deductions or standard deduction (see instructions).  5 Pro rate share of other deductions or standard deduction (see instructions).  6 Goss income from all sources (see instructions).  7 Provide line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  9 Wultiley line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (see instructions).  1 Drived line 3d by line 3e (						Fore	gn Country	or U.S. Posse	ession	Aller A	of the same	Total
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above and of the type checked above goe instructions;  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 atternative basis to determine its source (see instructions).    Deductions and losses (Caudion: See instructions):  2 Expanses definitely related to the income on line ta (attach statement).  3 Pro rate share of other deductions not definitely related:  a Cartain itemized deductions or standard deduction (see instructions).  5 Other cecutions (attach statement).  4 Gross foreign source income (see instructions).  6 Gross foreign source income (see instructions).  9 Weltilely inso bit by the 3f.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  9 Weltilely inso bit by the 3f.  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  1 ST A 4 01.  4 Pro rate share of interest expense (see instructions).  5 Add lines 2, 39, 4e, 4th, and 5 .  NONE  1 Subtract lines (spense).  1 ST A 5966.  5 Add lines 2 st of interest expense (see instructions).  9 One of the interest expense (see instructions).  1 ST A 4 01.  1 ST A 4	_	possession			VARI	OUS COUNTRIES	200		र्गी}		7	
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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).  2 Expenses definitely related to the income on line 1a (attach statement)												
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).  2 Expenses definitely related to the income on line 1a (attach statement)									1044			
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):  2								315	A	<u></u>	1a	2012
compensation from all sources is \$250,000 or more, and you used an alternative basis to determine its source (see instructions).  2 Expanses definitely related to the income on line 1a (attach statement).  3 Pro rata share of other deductions not definitely related:  a Certain itemized deductions or standard deduction (see instructions).  b Other deduction (see instructions).  c Add lines 3a and 3b .  1,537,401.  d Gross foreign source income (see instructions).  g Multiply line 3c by line 3f .  Pro rata share of interest expense (see instructions).  g Multiply line 3c by line 3f .  Pro rata share of interest expense (see instructions).  b Other interest expense (see instructions).  b Other interest expense (see instructions).  C Losses from foreign sources  Add lines 2, 3g, 4s 4b, and 5 .  NONE  Taxes withheld at source on:  (a) Other foreign taxes paid or Accrued (see instructions)  (b) Date paid (b) Dividends (c) Pants and royalties (m) interest expense (c) (a) Other foreign taxes paid or accrued (see instructions)  (b) Other interest expense (line 1c) Enter the result here and on line 15, page 2.  (b) Other foreign taxes paid or Accrued (see instructions)  (c) Date paid (line 3c) (line 3c) (line 1c) (li	1	b Check if line 1a i	s compensa	ation for perso	nal	7						
more, and you used an alternative basis to determine its source (see instructions).  Deductions and losses (Caution: See instructions).  2 Expanses definitely related to the income on line 13 (attach statement)		compensation fro	n employs m all source	e, your to sis\$250.000	or .	0.						
Deductions and losses (Caution: See instructions):  2 Expenses definitely related to the income on line 1a (attach statement).  3 Pro rata share of other deductions not definitely related: 3 Pro rata share of other deductions or standard deduction (see instructions) 4 Cortain itemized deductions or standard deduction (see instructions) 5 Differ deductions (see instructions) 6 Cores foreign source income (see instructions) 7 Divide line 3d by line 3 (see instructions) 8 Multiply line 3c by line 3f 9 Por rata share of interest expense (see instructions) 9 Multiply line 3c by line 3f 9 Por rata share of interest expense (see instructions) 1 Divide line 3d by line 3c (see instructions) 1 Divide line 3d by line 3c (see instructions) 1 Divide line 3d by line 3c (see instructions) 1 Divide line 3d by line 3c (see instructions) 2 Home mortgage interest (see instructions) 3 Home mortgage interest (see instructions) 4 Pro rata share of interest expense 5 Losses from foreign sources 5 Losses from foreign sources 5 Losses from foreign sources 6 Add lines 2, 3g, 4x-4b, and 5 7 Subtract lings 6 (com line 1a. Enter the result here and on line 15, page 2		more, and you t	used an alte	ernative basis	to							
SEE SOURCIT  STATEMENT  STATEMENT  Pro rata share of other deductions not definitely related: Certain itemized deductions or standard deduction (see instructions)  Dither deduction (see instructions)  C Add lines 3 a and 3b  Gross income from all sources (see instructions)  Divide line 3d by line 3e (see instructions)  Multiply line 3e by line 3f  Pro rata share of interest expense (see instructions)  Divide line 3d by line 3e (see instructions)  Foreign taxes paid or accrued line 1st seek flow (specific taxes paid or accrued (specific taxes paid												
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1a (attach statement)  Pro rata share of other deductions not definitely related:  a Certain itemized deductions or standard deduction (see instructions)  b Other deduction (state instructions)  c Add lines 3 and 3b  1						,	AND ADDRESS OF		- 20			SEE SOURCING
Pro rata share of other deductions not definitely related:  a Certain itemized deductions or standard deduction (see instructions)	2	Expenses definitel	ly related to	the income on	line		A STATE OF THE PARTY OF THE PAR					STATEMENT
related: a Certain itemized deductions or standard deduction (see instructions) b Other deduction (see instructions) c Add lines 3a and 3b d Gross foreign source income (see instructions) f Divide line 3d by line 3e (see instructions) g Multiply line 3c by line 3f Pro rata share of interest expense 14 of the instructions) b Other interest expense 5 Losses from foreign sources 6 Add lines 2, 3g, 4a-db, and 5 Credit is claimed for taxes (you must check one) (o) X Pad Taxes withheld at source on: (a) Other foreign taxes paid or accrued (b) Dividends (l) Rents and royalties (m) interest and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2  Add lines A through C, column (s). Enter the total here and on line 9, page 2						NONE	in the second second				1	
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deduction (see instructions)  b Other deductions (attach statement)  c Add lines 3 a and 3b  d Gross foreign source income (see instructions)  d Gross foreign source income (see instructions)  f Divide line 3d by line 3e (see instructions)  g Multiply line 3c by line 3f  4 Pro rata share of Interest expense (see instructions)  b Other interest expense  5 Losses from foreign sources  6 Add lines 2, 3q, 4a-4b, and 5  NONE  Subtract lines (com) line 1a. Enter the result here and on line 15, page 2  NONE  Foreign Taxes Paid or Accrued (see instructions)  (i) X Paid  (ii) Date paid  (ii) Date paid  (iii) Dividends  (iv) Dividends						. All de la constant	in.					
b Other deductions (attach statement)	а					T 4 400	T					
c Add lines 3a and 3b						Contract Con						
d Gross foreign source income (see instructions) e Gross income from all sources (see instructions) f Divide line 3 by line 3e (see instructions) g Wultiply line 3c by line 3f 4 Pro rata share of interest expense (see instructions) a Home mortgage interest (use works feet on page 14 of the instructions) b Other interest expense 5 Losses from foreign sources 5 Losses from foreign sources 6 Add lines 2, 3g, 4a-db, and 5 . NONE 7 Subtract line 6-from line 1a. Enter the result here and on line 15, page 2 . 7 NONE  Part II Foreign Taxes Paid or Accrued (see instructions)  Credit to claimed for taxes (you must check dige) (h) X Paid (p) Accrued (in the foreign currency) (in U.S. dollars foreign taxes paid or accrued for taxes withheld at source on: foreign taxes paid or accrued (j) Date paid or accrued (k) Dividends (l) Rents and royalties (q) Interest and royalties (q) Interest and royalties (q) Interest accrued (add cols, accrued (add cols, and royalties (q) Interest accrued (a) through (r))  A Add lines A through C, column (s). Enter the total here and on line 9, page 2	Ь			ement)								
e Gross income from all sources (see instructions)  f Divide line 3d by line 3 c (see instructions)  g Multiply line 3c by line 3 c.  4 Pro rata share of Interest expense see instructions)  b Other interest expense  5 Losses from foreign sources  6 Add lines 2, 3q, 4a-db, and 5  Subtract lines 6 (from line 1a. Enter the result here and on line 15, page 2  Part II Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes (you must check one)  (h) X Paid (h) Accrued Taxes withheld at source on: (ii) Date paid (ii) Accrued (ii) Rents and royalties (iii) Rents and royalties (iii) Rents and royalties (iii) Interest and royal	C				17700	<u>, 557, 401.</u>					4	
f Drivide line 3d by line 3e (see instructions)  g Multiply line 3c by line 3f  4 Pro rata share of Interest expense (see instructions):  a Home mortgage interest (use workshied on page 14 of the instructions)  b Other interest expense  5 Losses from foreign sources  6 Add lines 2, 3g, 4a,4b, and 5  NONE  7 Subtract line(6-from line 1a. Enter the result here and on line 15, page 2  Part II Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes withheld at source on: (n) Other foreign taxes paid or accrued (you must check one)  (h) X Pad (line x withheld at source on: (n) Other foreign taxes paid or accrued (y) Date paid or accrued (line x withheld at source on: (n) Other foreign taxes paid or accrued (o) Dividends (p) Rents and royalfies (m) interest accrued (o) Dividends (q) Interest (a) Interest accrued (add cols, (a) through (r))  A A Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8	d			4134	114 1 100 Table Street							
Multiply line 3c by line 3f	ė			901	15) <u>\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</u>	· · · · · · · · · · · · · · · · · · ·				7	1	
A Pro rata share of Interest expense (userworkshiest on page 14 of the instructions)  D Other interest expense 5 Losses from foreign sources 6 Add lines 2, 3g, 4ar4b, and 5 . NONE	f			4 700 7000	· ·							
a Home mortgage interest (use worksfield on page 14 of the instructions)  b Other interest expense 5 Losses from foreign sources 6 Add lines 2, 3g, 4a-4b, and 5 7 Subtract line 6 (com line 1a. Enter the result here and on line 15, page 2. ▶ 7 NONE  Part II Foreign Taxes Paid or Accrued (see instructions)  Foreign taxes paid or accrued  (you must check one) (h) X Paid Taxes withheld at source on: (n) Other foreign taxes paid or accrued (g) Date paid or accrued (g) Date paid or accrued (g) Dividends (g) Dividends (g) Rents and royalties and royalties and royalties (m) interest accrued (o) Dividends (g) Interest accrued (add cois, (o) through (r))  Add lines A through C, column (s). Enter the total here and on line 9, page 2. ▶ 8	9			1110	-949							
Dother interest expense  Losses from foreign sources  Add lines 2, 3g, 4a-4b, and 5.  Subtract lines 6-from line 1a. Enter the result here and on line 15, page 2.  Part II Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes in foreign currency  (you must check one)  (h) X Paid (i) Accrued (ii) Rents and royalties and royalties and royalties and royalties and royalties and royalties (iii) interest accrued (iii) Dividends (iii) Rents and royalties and royalties (iii) Interest accrued (iii) Dividends (iii) Interest accrued (iii) Dividends (iii) Dividends (iii) Rents and royalties (iii) Interest accrued (iii) Dividends (iii) Rents and royalties (iii) Interest accrued (iii) Dividends (iii) Rents and royalties (iii) Interest accrued (iii) Dividends (i	4			ACCOUNTS ASSESSED FOR THE PARTY OF THE PARTY	REF.				X 100050		1	
Dother interest expense  Losses from foreign sources  Add lines 2, 3g, 4a,4b, and 5  NONE  Subtract line 6 from line 1a. Enter the result here and on line 15, page 2.  Part   Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes (you must check one)  (h) X Paid (i) Accrued (i) Rents (ii) Rents (ii) Rents (iii) Paid or accrued (ii) Date paid or accrued (ii) Date paid or accrued (ii) Rents (iii) Rents	а		and the same of	900.	age							
Losses from foreign sources  Add lines 2, 3g, 4a 4b, and 5	10		9,505	第. 章								
6 Add lines 2, 3g, 4a;4b, and 5											1	
The state of the		74	A	251	∵							
Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes for taxes for taxes paid or accrued  (you must check dip)  (h) X Paid Taxes withheld at source on:  (i) Date paid or accrued  (ii) Date paid or accrued  (iii) Dividends (iii) Rents and royalties (m) interest accrued  A Add lines A through C, column (s). Enter the total here and on line 9, page 2  Foreign taxes paid or accrued  Foreign taxes paid or accrued  (n) Other foreign taxes withheld at source on:  (n) Other foreign taxes withheld at source on:  (n) Other foreign taxes paid or accrued (n) Dividends (n) Interest accrued (add cols, and royalties (n) Interest accrued (add cols, accrued	_						l				6	NONE
Foreign taxes paid or accrued    Foreign taxes paid or accrued   In U.S. dollars		41.84.	THE SECOND COST OF STREET					· · · · · ·		<u> ▶</u>	7	NONE
for taxes withheld at source on:  (you must check one)  (h) X Paid Accrued  (i) Date paid or accrued  (ii) Date paid or accrued  (iv) Dividends  (ii) Rents and royalties  (iii) Date paid or accrued  (iv) Dividends  (iv) Other foreign taxes paid or accrued  (iv) Dividends  (iv) Other foreign taxes paid or accrued  (iv) Dividends  (iv) Other foreign taxes  (iv) Other foreign taxes  (iv) Other foreign taxes  (iv) Dividends  (iv) Dividends  (iv) Other foreign taxes  (iv) Dividends  (iv) Other foreign taxes  (iv) Other foreign taxes  (iv) Dividends  (iv) Dividends  (iv) Dividends  (iv) Other foreign taxes  (iv) Dividends  (iv) Other foreign taxes  (iv	F (3)			a or Accrue	a (see ins							
(h) X Paid Taxes withheld at source on: (n) Other foreign taxes (i) Date paid or accrued (k) Dividends and royalties (m) interest accrued (a) Dividends (b) Dividends (c) through (c) thro		for taxes	ÇZ.	In focal		For	eign taxes pai	d or accrued				
(i) Date paid or accrued (k) Dividends (I) Rents and royalties (m) interest accrued (o) Dividends (p) Rents and royalties (q) Interest accrued (add cols, (o) through (r))  A B C Add lines A through C, column (s). Enter the total here and on line 9, page 2	Ę	, , ,		III IOIEI	git currency				In U	.S. dollars		
(i) Date paid or accrued (k) Dividends (I) Rents and royalties (m) interest accrued (o) Dividends (p) Rents and royalties (q) Interest accrued (add cols, (o) through (r))  A B C Add lines A through C, column (s). Enter the total here and on line 9, page 2	5		Taxes	withheld at sour	ce on:		Taxes	withheld at sou	irce on:			(s) Total foreign
or accrued (k) Dividends and royalties (m) interest accrued (o) Dividends and royalties (q) Interest accrued (o) through (r))  A  B  C  Add lines A through C, column (s). Enter the total here and on line 9, page 2	ပိ		<u> </u>								es	
A B C S Add lines A through C, column (s). Enter the total here and on line 9, page 2			(k) Dividends		(m) interest		(o) Dividends		(q) Interest			•
B C 8 Add lines A through C, column (s). Enter the total here and on line 9, page 2	A							and regulates				
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2	-	K 1000 100										
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2	_	- ii - iii -	All b									<u> </u>
	_	Add lines A three	ah C aalu-	nn (e) Entanth	o total have	and an France					-	<u> </u>
vi i aperitora neutrouri Met Notice, see instructions.						and on line 9, page	2			▶	8	- 4412
- orm 1116 (2011		. apoinois reducti	on Act NORC	e, ase maduct	ons.							Form <b>1116</b> (2011)

Pa	rt II Figuring the Credit		rage Z
9	Enter the amount from line 8. These are your total foreign taxes paid	T	
	or accrued for the category of income checked above Part I		
10	Carryback or carryover (attach detailed computation) STMT. 16. 10 18, 937.		
	, , , , , , , , , , , , , , , , , , , ,	1	
11	Add lines 9 and 10		
		1	
12	Reduction in foreign taxes (see instructions)	,	
	Transfer to the food monderous).	1	
13	Taxes reclassified under high tax kickout (see instructions)		April 1
	The state of the s	1	Message Wes
		-artus	Continue of the second
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	18,937.
15	Enter the amount from line 7. This is your taxable income or (loss) from		機型的ino
	sources outside the United States (before adjustments) for the category		
	of income checked above Part I (see instructions) STMT 16 . 15 NONE		ı
16	Adjustments to line 15 (see instructions)	1	
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.)		
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		
	Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see		
	instructions.		
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19	NONE
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,		
250	Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37.	20	2,988,626.
	Caution: If you are completing line 20 for separate gategory e (lump-sum distributions), see		
	Instructions.		
21	Multiply line 20 by line 19 (maximum amount of credit)	21	NONE
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		
_	(see instructions)	22	NONE
	Summary of Credits From Separate Parts III (see instructions)		
23	Credit for taxes on passive category income 23 NONE		(30% A A A A A A A A A A A A A A A A A A A
24	Credit for taxes on general category income		
25	Credit for taxes on certain income re-sourced by treaty25		
26	Credit for taxes on tump-sum distributions 26		
27	Add lines 23 through 26	27	NONE
28	Enter the smaller of line 20 or line 27	28	NONE
29	Reduction of credit for international boycott operations. See instructions for line 12	29	
30	Subtractine 29 from line 28. This is your foreign tax credit. Enter here and on Form 1040, line 47;		5,000
	Form 1940NR, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a	30	NONE
	THE STATE OF THE S		Form 1116 (2011)

Department of the Treasury

JSA

1X1410 2.000

Internal Revenue Service (99)

Foreign Tax Credit

(Individual, Estate, or Trust)

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

See separate instructions.

2011

Attachment 1

Sequence No. Name WILLARD M ROMNEY Identifying number as shown on page 1 of your fax return ANN D ROMNEY 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. Passive category income Section 901(j) income Lump-sum distributions General category income Certain income re-sourced by treaty 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 you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession. Taxable Income or Loss From Sources Outside the United States (for Category Checked Above) Part I Foreign Country or U.S. Possession Α Ç (Add cols. A. B. and C.) Enter the name of the foreign country or U.S. VARIOUS COUNTRIES 1a Gross income from sources within country shown above and of the type checked above (see instructions): \_\_\_\_\_\_ 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) . Deductions and losses (Caution: See instructions): SEE SOURCING 2 Expenses definitely related to the income on line STATEMENT 3 Pro rata share of other deductions not definitely related: a Certain itemized deductions or standard b Other deductions (attach statement) c Add lines 3a and 3b d Gross foreign source income (see instructions) Gross income from all sources (see instructions) Divide line 3d by line 3e (see instructions) Pro rata share of interest expense (see instructions): Home mortgage interest (use worksheet on page b Other interest expense 🐘 Losses from foreign sources . . . . . . . . . 6 Add lines 2, 3g, 48±4b, and 5 . . . . . . . . . . NONE NONE Subtract line:6 from fine 1a. Enter the result here and on line 15, page 2. NONE Part II Foreign Taxes Paid or Accrued (see instructions) Credit is claimed Foreign taxes paid or accrued for taxes @ In foreign currency (you must check one) in U.S. dollars Х Paid Taxes withheld at source on: (n) Other Taxes withheld at source on: (r) Other (s) Total foreign Accrued foreign taxes foreign taxes taxes paid or paid or paid or accrued (add cols, (i) Date paid (I) Rents (p) Rents (k) Dividends (m) interest (o) Dividends (q) Interest accrued accrued (o) through (r)) or accrued and royalties and royalties Α В Ç Add lines A through C, column (s). Enter the total here and on line 9, page 2 For Paperwork Reduction Act Notice, see instructions. Form 1116 (2011)

Pa	Figuring the Credit		
9	Enter the amount from line 8. These are your total foreign taxes paid	Ι	
·	or accrued for the category of income checked above Part I		
10	Carryback or carryover (attach detailed computation) STMT. 18 10 100, 700.		
11	Add lines 9 and 10		
12	Reduction in foreign taxes (see instructions),		
	Taxes reclassified under high tax kickout (see instructions)		- An
13	Taxes reclassified under high tax kickout (see instructions)	1	The state of the s
		als/Dm	The state of the s
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	100,700.
15	Enter the amount from line 7. This is your taxable income or (loss) from		white
	sources outside the United States (before adjustments) for the category		
	of income checked above Part I (see instructions) STMT, 18. 15	1	
16	the state of the s		
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.)		
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. SEE. STATEMENT, 20 18 8,632,739.	9	
	Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see		
	instructions.	101090	700000000
19	Divide line 17 by line 18. If line 17 is more than line 18, enter "1".	19	NONE
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,		100 1000
	Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37	20	2,988,626.
	Caution: If you are completing line 20 for separate category e (lump-sum distributions), see		100
	instructions.		
21	Multiply line 20 by line 19 (maximum amount of credit)	21	NONE
22	Enter the smaller of line 14 or line 21, it 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		
	(see instructions)	١,,	
Par	Summary of Credits From Separate Parts III (see instructions)	22	NONE
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 or lump-sum distributions 26		
27	Add lines 23 through 26	27	
28	Enter the smaller of line 20 or line 27	28	
29	Reduction of credit for international boycott operations. See instructions for line 12	29	
30	Subtract line 29 from line 28. This is your foreign tax credit. Enter here and on Form 1040, line 47;		
	45 AS	30	96.94
	E. S. C.		Form 1116 (2011)

#### ALTERNATIVE MINIMUM TAX

## Foreign Tax Credit

(Individual, Estate, or Trust)

Attach to Form 1040, 1040NR, 1041, or 990-T. Department of the Treasury See separate instructions.

OMB No. 1545-0121

Form 1116 (2011)

Internal Revenue Service (99)

Form 1116

Sequence No. 19 Name WILLARD M ROMNEY Identifying number as shown on page 1 of your tax return ANN D ROMNEY 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. Passive category income Section 901(i) income Lump-sum distributions General category income Certain income re-sourced by treaty 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 for paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession. Taxable Income or Loss From Sources Outside the United States (for Category Checked Above) Foreign Country or U.S. Possession Α С (Add cols. A, B, and C.) Enter the name of the foreign country or U.S. possession

1a Gross income from sources within country shown VARIOUS COUNTRIES above and of the type checked above (see instructions): \_\_\_\_\_\_ NONE 1a NONE 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) . > Deductions and losses (Caution: See instructions): 2 Expenses definitely related to the income on line 1a (attach statement) . . . . . . . . . . . . . . . NÖNE 3 Pro rata share of other deductions not definitely related: a Certain itemized deductions or standard deduction (see instructions) b Other deductions (attach statement) 805 d Gross foreign source income (see instructions) Gross income from all sources (see instructions) NONE Divide line 3d by line 3e (see instructions) . . . NONE Multiply line 3c by line 3f . . . NONE Pro rata share of interest expense (see instructions): Home mortgage interest (use-worksheet on page b Other interest expense Losses from foreign sources ...... Add lines 2, 3g, 4ae4b, and 5 . . . . . . . . . NONE NONE Subtract line 6 from line 1s. Enter the result here and on line 15, page 2. . . . NONE Part II Foreign Taxes Paid or Accrued (see instructions) Credit is claimed Foreign taxes paid or accrued for taxes (you must check one) In foreign currency Country In U.S. dollars Paid Taxes withheld at source on: (n) Other Taxes withheld at source on: (r) Other (s) Total foreign Accrued foreign taxes foreign taxes taxes paid or paid or paid or accrued (add cols. (j) Date paid (I) Rents (p) Rents (k) Dividends (m) Interest (o) Dividends accrued (q) Interest accrued or accrued (a) through (r)) and royalties and royalties В C Add lines A through C, column (s). Enter the total here and on line 9, page 2

For Paperwork Reduction Act Notice, see instructions.

Form 1116 (2011) WILLARD M ROMNEY & ANN D ROMNEY

Pa	Figuring the Credit		a (177)
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		
10	Carryback or carryover (attach detailed computation)		
11	Add lines 9 and 10		
12	Reduction in foreign taxes (see instructions)		
13	Taxes reclassified under high tax kickout (see instructions)	,	District Control of the Control of t
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes available for credit	14	
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 (see instructions).		1500 Apr
16 17	Adjustments to line 15 (see instructions)		
18	Part I. Skip lines 18 through 22. However, if you are filing more than one Form 1116, you must complete line 20.)		
	without the deduction for your exemption		
19		19	NONE
20	Divide line 17 by line 18. If line 17 is more than line 18, enter "1"	15	NONE
	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	20	3,213,051.
	Caution: If you are completing line 20 for separate gategory e (lump-sum distributions), see		
	instructions.		
21	Multiply line 20 by line 19 (maximum amount of credit)	21	NONE
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		
	(see instructions)	22	
	Summary of Credits From Separate Parts III (see instructions)		
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 treaty25		
26	Credit for taxes on lump-sum distributions		
27	Add lines 23 through 26	27	
28	Enter the smaller of line 20 or line 27	28	
29	Reduction of credit for international boycott operations. See instructions for line 12	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	_ 4440
	765-		Form 1116 (2011)

# ALTERNATIVE MINIMUM TAX

Department of the Treasury Internal Revenue Service (99)

# Foreign Tax Credit (Individual, Estate, or Trust)

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

► See separate instructions.

OMB No. 1545-0121

Resident of (name of country)   UNITED STATES	Name	WILLARD M		Y					Identifying r	umber as sh	own o	n page 1 of your lax return
Form 11-16. Report all amounts in U. S. dollars accept where specified in Part II bolow.    Passive category income   C   Section 901(j) income   Certain income re-ourced by treaty   Resident of (name of country)   VINTED STATES    Role: 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 below.   Resident of (name of country)   VINTED STATES    Role: If you paid taxes to only 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)					Katad ba	-l O O-t		- :- 11 - : 1	- 00			
Passive category income  Certain income re-sourced by treaty  Resident of (name of country)   UNITED STATES  Note: If you paid taxes to only one foreign country or U.S. possession, use a separate column A in Part I and line A in Part II thick, you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.  Foreign Country or U.S. possession use a separate column and line for each country or possession.  The part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)  Foreign Country or U.S. Possession  Foreign Country or U.S. Possession  Total  A SAUCIS CONTRIS  C NAME of the 1a is compensation for presond compensation or presond compensation or presond compensation for presond compensation or presond compensation for presond compensation or presond compensation or presond compensation or presond compensation for presond compensation or presond compensation or presond compensation for presond compensation for presond compensation or presond compensation or presond compensation for mall sources is \$250,000 or more, and you used an attendate base to later than the statement).  Deductions and losses (Candom: See instructions).  Possession from all sources is \$250,000 or more, and you used an attendate base to later than the statement of the distribution that the statement of the distribution that the statement of the distribution that the statement of the stat								e in the instr	uctions. Che	ick only one	box o	n each
Resident of (name of country)   UNITED STATES	FOLI	itilo. Keportalia ∸⊐	mounts in C	. S. dollars exc	ept where sp	ecined in Part II be	low.					
Mote: 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—II you haid taxes to move than one foreign country or U.S. possession, use a separate column and line for each country or provided taxes to move than one foreign country or U.S. possession. Sources Outside the United States (for Category Checked Above)    Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)	a	Passive catego	ry income	с	Section 90	1(j) income		е	Lump-sum	distributions		
Note: If you paid taxes to only one foreign country or U.S. possession, use column Ail in Part II and line A in Part III II you regid taxes to move 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  A B C  Codd cots. A B, and C.)  Part I a loss score from sources within country shown shows and of the hip or checked above peer instructions.  Deductions and losses (Candion: See instructions).  Provide a source see instructions.  Provide a shown of the deductions or standard deduction (see instructions).  Provide a shown of other deductions and definitely related:  a Certain itemized deductions or standard deduction (see instructions).  Dither deductions (statch statement).  A Gross foreign source income (see instructions).  MONE  Divide line 3 by line 3 et see instructions).  MONE  NONE  NONE  NONE  NONE  NONE  NONE  NONE  NONE  Traces withheld at sources.  NONE  To rate share of interest operates.  S Codd cots. A B, and C.)  NONE  S codd cots. A B, and C.)  Total  A G Gestorm from all sources see instructions and definitely related:  To rate share of other deductions or standard deduction (see instructions).  NONE  N	ь 🖸	General catego	ry income	d	Certain inc	ome re-sourced by	treaty					
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Enter the name of the foreign country or U.S. Possession  Foreign Country or U.S. Possession  A											445	THE PARTY IN THE PARTY IN
Foreign Country or U.S. Possession    Total (Add cols. A. 8, and C.)	_										9 <sub>6</sub> ,	A.V.
g Enter the name of the foreign country or U.S. 19	Ρą	Taxable	income c	r Loss Fro	n Source					necked A		
A Gost income from sources within country shown above and of the type checked above (see instructions)   NONE						Forei	gn Country o	or U.S. Posse	ssion	- No. 4	Smolid	Total
a Goss income from source within country shown above and of the type checked above (use instructions).  b Check (f 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 afternative basis to determine its source (see instructions).  □ Expenses definitely related to the income on line 1a (attach statement)  □ Protate share of other deductions not definitely related:  □ Cartain itemized deductions or standard deduction (see instructions).  □ Other deduction (see instructions)  □ Other deduction (set instructions)  □ Other deductions (attach statement)  □ Add lines 3a and 3b  □ Other deductions (attach statement)  □ Other deductions (attach statement)  □ Other deductions (attach statement)  □ Add lines 3a and 3b  □ Other deductions (see instructions)  □ Other deductions (attach statement)  □ Other line at by line 3c (see instructions)  □ Other line at by line 3c (see instructions)  □ Other line at by line 3c (see instructions)  □ Other interest expense  □ Other	a	Enter the name or	f the foreign	country or U.	s	Α		В	(	: AV AV	(4	Add cols. A, B, and C.)
above and of the type checked above (see instructions):    Discrete   Discret	9	possession			VARIO	OUS COUNTRIES			die.	APP.		
Deduction is a second personal component of the personal component is source (see instructions).   Deductions and losses (Caution: See instructions).   Deductions (See instructions)	1 a	Gross income from	sources with	in country show	wn				-5.15.		1 1	
Deductions and losses (Caution: See instructions):  2 Expenses definitely related to the income on line Is a (attach statement).  3 Pro rata share of other deductions not definitely related:  a Certain itemized deductions or standard deduction (see instructions).  4 Mone of the deduction (see instructions).  5 Differ deductions (statch statement).  5 Pro rata share of other deductions or standard deduction (see instructions).  6 Gross foreign source income (see instructions).  7 Post 1.  9 Multiply line 3c by line 3 (see instructions).  9 Multiply line 3c by line 3f (see instructions).  1 Pro rata share of interest expense of the deduction of the income on line Is a fine of the income of the inc			- ,	,	ee							
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 distartine its source (see instructions).  2 Expenses definitely related to the income on line 1a (attach statement)		instructions):										
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deduction (see instructions)  b Other deductions (attach statement)  c Add lines 3a and 3b  d Gross foreign source income (see instructions)  d Gross foreign source source income (see instructions)  f Divide line 3d by line 3f  Pro rata share of interest expense (see instructions):  a Home mortgage interest (use worksheet on page 14 of the instructions)  b Other interest expense  5 Losses from foreign sources  5 Add lines 2 3q, 43-4b, and 5  NONE  Part II Foreign Taxes Paid or Accrued (see instructions)  (i) X Paid (i) Accrued Taxes withheld at source on: (ii) Other foreign taxes paid or accrued (i) Date paid or accrued (ii) Dividends (ii) Rents and royalties (m) Interest accrued (o) Dividends (q) Interest paid or accrued (add cols. (o) through (r))  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2  8 Add lines A through C, column (s). Enter the total here and on line 9, page 2			daduction	e or stond	and	# 4 44	\$F*					
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b Other interest expense  Losses from foreign sources  Add lines 2, 3g, 4g, 4b, and 5.  NONE  NONE  Subtract line 6 from line 1a. Enter the result here and on line 15, page 2.  Part II Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes (you must check does) In foreign currency In U.S. dollars  (h) X Paid Taxes withheld at source on: (n) Other foreign taxes paid or accrued (i) Date paid or accrued (k) Dividends (l) Rents and royalties (m) Interest accrued (o) Dividends (p) Rents and royalties (q) Interest accrued (o) Dividends (n) Interest accrued (o) Dividends (o) Dividends (o) Interest accrued (o) Dividends (o) Interest accrued (o) Interest accrued (o) Dividends (o) Interest accrued (o) Interest accrued (o) Dividends (o) Interest accrued (o) Intere		14 of the instruction	ons) 🦸	<u> </u>								
6 Add lines 2, 3q, 4a, 4b, and 5	b	Other interest expe	ense 📜 🚄		L		10.000			20/20/03/03/03/03/03/03/03/03/03/03/03/03/03		
6 Add lines 2, 3q, 4a, 4b, and 5	5	Losses from foreign	n sources					(A)				
Part   Foreign Taxes Paid or Accrued (see instructions)  Credit is distinct for taxes Paid or Accrued (see instructions)  (you must check one)	6	96	h. 4	TD.		NONE					6	NONE
Foreign Taxes Paid or Accrued (see instructions)  Credit is claimed for taxes (you must check one) In foreign currency In U.S. dollars  (h) X Paid Taxes withheld at source on: foreign taxes paid or Accrued (i) Date paid or accrued (k) Dividends and royalties (m) Interest accrued (o) Dividends and royalties (q) Interest accrued (o) through (r))  A Add lines A through C, column (s). Enter the total here and on line 9, page 2  Foreign taxes paid or accrued in U.S. dollars  Taxes withheld at source on: (r) Other foreign taxes paid or accrued (o) Dividends and royalties (q) Interest accrued (o) through (r))  A Add lines A through C, column (s). Enter the total here and on line 9, page 2			9.00							<b>•</b>	_	
Foreign taxes paid or accrued    Foreign taxes paid or accrued   In U.S. dollars	_	9795	-27021111111								•	
for taxes withheld at source on:  (h) X Paid   Taxes withheld at source on:   (n) Other   Taxes withheld at source on:   (r) Other   foreign taxes   paid or   accrued   (l) Rents   and royalties   (m) Interest   accrued   (o) Dividends   (d) Interest   accrued   (d) Interest   accrued   (e) Dividends   (f) Interest   accrued   (f) Interest   (f) Interest   accrued   (f) Interest   (f) Interest   accrued   (f) Interest   (f		Address of the latest of the l			- 1000 1110		eign taxes nai	d or accrued				
(h) X Paid Taxes withheld at source on: (n) Other foreign taxes (i) Date paid or accrued (k) Dividends and royalties (m) Interest accrued (n) Other foreign taxes paid or accrued (n) Other foreign taxes paid or accrued (n) Dividends (n) Interest accrued (n) Other foreign taxes paid or accrued (n) Dividends (n) Interest accrued (n) Other foreign taxes paid or accrued (n) Dividends (n) Interest accrued (n) Other foreign taxes paid or accrued (n) Dividends (n) Interest a		for taxes and	<del></del>	In fac-1	an cumono:		3 myca pai	uoujacu	I- 11	C delless		1000
(i) Date paid or accrued (k) Dividends (I) Rents and royalties (m) Interest accrued (o) Dividends (q) Interest (o) Interes	2	, , ,		in iorei	gar correlacy				in U,	o, notists	-	3 (2 (22)
(i) Date paid or accrued (k) Dividends (I) Rents and royalties (m) Interest accrued (o) Dividends (q) Interest (o) Interes	=	(h) X Paid	Taxes	withheld at sour	ce on:	(n) Other	Taxes	withheld at sou	irce on:	(r) Other		(s) Total foreign
(i) Date paid or accrued (k) Dividends (I) Rents and royalties (m) Interest accrued (o) Dividends (q) Interest (o) Interes	S.	(i) Accrued	22.0%()41				100		EUE 1950/64			
A B Add lines A through C, column (s). Enter the total here and on line 9, page 2	٠,	(j) Date paid	Dis District de	(I) Rents		•	4.10:11	(p) Rents				•
B C 8 Add lines A through C, column (s). Enter the total here and on line 9, page 2			(K) Dividends		(m) Interest	accrued	(o) Dividends		(q) Interest	accrued		(o) through (r))
B C 8 Add lines A through C, column (s). Enter the total here and on line 9, page 2	^						-				+	
C 8 Add lines A through C, column (s). Enter the total here and on line 9, page 2												
8 Add lines A through C, column (s). Enter the total here and on line 9, page 2												
											$\perp$	
	8	Add lines A throu	gh C, colun	nn (s). Enter th	e total here a	and on line 9, page	2			▶	8	6 5000 200-200
												Form 1116 (2011)

Form 1116 (2011) WILLARD M ROMNEY & ANN D ROMNEY

Pa	TELL Figuring the Credit				
9		9			
	or accrued for the category of income checked above Part I	9			
10	Carryback or carryover (attach detailed computation) STMT. 21	10	119,936.	-	
11	Add lines 9 and 10	11	119,936.		
12	Reduction in foreign taxes (see instructions)	12	( )	-	
13	Taxes reclassified under high tax kickout (see instructions)	13			Service The Service Se
14	Combine lines 11, 12, and 13. This is the total amount of foreign taxes availa	ble fo	or credita	14	119,936.
15	Enter the amount from line 7. This is your taxable income or (loss) from		1		20000000
	sources outside the United States (before adjustments) for the category		The state of the s		
	of income checked above Part I (see instructions),	15	⊕ NONE		
16	Adjustments to line 15 (see instructions)	16	A AP		
17	Combine the amounts on lines 15 and 16. This is your net foreign		The state of the s		
	source taxable income. (If the result is zero or less, you have no				
	foreign tax credit for the category of income you checked above	4			
	Part I. Skip lines 18 through 22. However, if you are filing more than	46			
	one Form 1116, you must complete line 20.)	17	NONE		
18	Individuals: Enter the amount from Form 1040, line 41, or Form	19	tate.		
	1040NR, line 39. Estates and trusts: Enter your taxable income	53.			
	without the deduction for your exemption. SEE, STATEMENT, 23	18	11,487,516.	Į.	
	Caution: If you figured your tax using the lower rates on qualified divided instructions.	nds (	or capital gains, see		
19	Divide line 17 by line 18, If line 17 is more than line 18, enter "1"			19	NONE
20	Individuals: Enter the amount from Form 1040, line 44, If you are a non				1,01,12
	amount from Form 1040NR, line 42. Estates and trusts: Enter the an				
	Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37			20	3,213,051.
	Caution: If you are completing line 20 for separate trategory e (lump				,
	instructions.			7 8	
21	Multiply line 20 by line 19 (maximum amount of credit)			21	NONE
22	Enter the smaller of line 14 or line 21. The this is the only Form 1116 yo				
	through 27 and enter this amount on line 28. Otherwise, complete the a				
	(see instructions)		<b>&gt;</b>	22	NONE
Pai	t IV Summary of Credits From Separate Parts III (see instructions)				
23	Credit for taxes on passive category income	23	, iii		10
24	Credit for taxes on general category income	24	NONE		
25	Credit for taxes on certain income re-sourced by treaty	25			
26	Credit for taxes on lump-sum distributions	26	1000		
27	Add lines 23 through 26			27	NONE
28	Enter the smaller of line 20 or line 27			28	NONE
29	Reduction of credit for international boycott operations. See instructions for li			29	
30	Subtract line 29 from line 28. This is your foreign tax credit. Enter here and				
_	Form 1040NB, line 45; Form 1041, Schedule G, line 2a; or Form 990-T, line	40a	<u> ▶</u>	30	NONE
	The state of the s				Form 1116 (2011)

# Farm 6251

Department of the Treasur

Internal Revenue Service (99)

## Alternative Minimum Tax - Individuals

➤ See separate instructions.

Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074 20 11 Attachment Sequence No. 32

Name(s) shown on Form 1040 or Form 1040NR Your social security number WILLARD M ROMNEY & ANN D ROMNEY Alternative Minimum Taxable Income (See instructions for how to complete each line.) Part I 1 If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41 and go to line 2. Otherwise, enter the amount from Form 1040, line 38, and go to line 7. (If less than zero, enter as a negative amount.) 1 15,212,896. Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4, or 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-2 3 Taxes from Schedule A (Form 1040), line 9 3 549,450. Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet in the instructions for this line 4 Miscellaneous deductions from Schedule A (Form 1040), line 27 劉1,978. Tax refund from Form 1040, line 10 or line 21. 7 NONE Investment interest expense (difference between regular tax and AMT) 8 Biologic Span Depletion (difference between regular tax and AMT) 9 10 11 12 Qualified small business stock (7% of gain excluded under section 1202) . . . . . . . 13 Exercise of incentive stock options (excess of AMT income over regular tax income) 14 14 Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A) . . . . 15 Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)... 16 Disposition of property (difference between AMT and regular tax gain or loss) 17 17 NONE Depreciation on assets placed in service after 1986 (difference between regular tax and AMT) 18 18 NONE Passive activities (difference between AMT and regular tax income or loss) 19 19 Loss limitations (difference between AMT and regular tax income or loss) 20 Circulation costs (difference between regular tax and AMT) 21 21 Long-term contracts (difference between AMT and regular tax income) 22 Mining costs (difference between regular tax and AMT) 23 Research and experimental costs (difference between regular tax and AMT) 24 24 Income from certain installment sales before January 1, 1987 25 25 26 Other adjustments, including income-based related adjustments 27 28 Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 16,834,325. Alternative Minimum Tax (AMT) Part II 29 Exemption. (If you were under age 24 at the 2nd of 2011, see instructions.) AND line 28 is not over . . . THEN enter on line 29 ... \$112,500 \$48,450 STMT 25 74,450 29 37,225 NONE 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. ... 30 16,834,325. If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter. If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form F040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, Enecessary), complete Part III on the back and enter the amount from line 54 here. 31 3,213,051 All others: if line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result. 32 Alternative minimum tax foreign tax credit (see instructions) 32 NONE 33 Tentative minimum tax. Subtract line 32 from line 31 3,213,051. 33 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 Schedule J to figure your tax, the amount from line 44 of Form 1040 must be 34 2,988,626. 35 AMT. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 45. 35 224,425. For Paperwork Reduction Act Notice, see your tax return instructions. Form 6251 (2011)

Form 6251 (2011)

\$69,000 if married filing jointly or qualifying widow(er).     \$34,500 if single or married filing separately, or     \$46,250 if head of household.  44 Enter the amount from line 7 of the Qualified Dividends and Cagtal Gain Tax. Worksheet in the instructions for Form 1040, line 44, or the amount from line 7 of the Schedule D Tax Worksheet in the instructions for Schedule D Tiprom 1040, whichever applies (as figured for the regular tax). If youdfal not complete either worksheet for the regular tax, enter -0.  45 Subtract line 44 from line 43. If zero or less, enter -0.  46 Enter the smaller of line 36 or line 37.  47 Enter the smaller of line 45 or line 46.  48 Subtract line 47 from line 48  49 Multiply line 48 by 15% (15).  49 Multiply line 48 by 15% (15).  49 In 1, 727, 378.  49 If line 38 is zero or blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.  50 Subtract line 46 from line 40.  51 Multiply line 50 by 25% (25).  52 3, 213, 051.	Pa	Complete Part III only if you are required to do so by line 31 or by the Foreign Earned Income Tax V	Vork	sheet in the instructions
37 Either the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 41, 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 for enter.  38 Einer 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 is explained for the AMT, explained	36		36	16,834,325.
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 from line 37. Otherwise, add lines 37 and 38, and sine 4 files AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and sine 4 files amount from line 37. Otherwise, add lines 37 and 38, and sine 4 files amount from line 37. Otherwise, add lines 37 and 38, and sine 4 files are files from 2555 or 2556-EZ, see instructions for the amount to 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 2555 or 2556-EZ, see instructions for the amount to enter 38, 311, 515, 850.  40 Enter the smaller of line 36 or line 39	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		
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 1.  40 Enter the smaller of line 36 or line 39	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		
41 Subtract line 40 from line 36	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		
41 Subtract line 40 from line 36	40	Enter the smaller of line 36 or line 39	40	11.515.850.
42 If line 41 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 41 by 26% (28). Otherwise, multiply line 41 by 26% (28) and subtract \$3,500 (\$1,750 if married filing separately) from the resultGTMT, 2,7 ▶ 42 1, 485,673.  43 Enter:  • \$89,000 if married filing jointly or qualifying widow(er).  • \$34,500 if being or married filing separately, or  • \$46,250 if head of household.  44 Enter the amount from line 7 of the Qualified Dividends and Captal Gan Tax. Worksheet in the instructions for Form 1040, line 44, or the amount from line 7 of the Qualified Dividends and Captal Gan Tax. Worksheet in the instructions for Form 1040, line 44, or the amount from line 7 of the Qualified Dividends and Captal Gan Tax. Worksheet in the Instructions for Form 1040, line 44, or the amount from line 40 dividends and Captal Gan Tax. Worksheet for the regular tax, if youdid not complete either worksheet for the regular tax. If zero or less, enter -0.  45 Subtract line 44 from line 43. If zero or less, enter -0.  46 Enter the smaller of line 36 or line 37.  47 Line 38 is zero or Blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.  49 Multiply line 48 by 15% (.15)  50 Subtract line 46 from line 40	41			
### Part	200			
43 Enter:  • \$69,000 if married filing jointly or qualifying widow(er).  • \$34,500 if single or married filing separately, or  • \$46,250 if head of household.  44 Enter the amount from line 7 of the Qualified Dividends and Capital Gen Tax.  Worksheet in the instructions for Form 1040, line 44 or the amount from line 10 fine 45 or the Schedule D Tax Worksheet in the instructions for Schedule D (Form 1040).  whichever applies (as figured for the regular tax), if you slid not complete either worksheet for the regular tax enter-0.  45 Subtract line 44 from line 43. If zero or less, enter-0.  46 Enter the smaller of line 36 or line 37.  46 Int, 515, 850.  47 Enter the smaller of line 45 or line 46.  48 Subtract line 47 from line 46.  49 Multiply line 48 by 15% (15).  49 Interest of the 45 by 15% (15).  49 Interest of the 46 from line 40.  50 Subtract line 46 from line 40.  51 Multiply line 50 by 25% (25).  52 Add lines 42, 49, and 51,  53 If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (26). Otherwise, multiply line 36 by 26% (28) and subtract 33,500 (\$1,750 if married filing separately) from the result.  53 Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter	42		42	1,485,673.
\$69,000 if married filing jointly or qualifying widow(er).     \$34,500 if single or married filing separately, or     \$46,250 if head of household.  44 Enter the amount from line 7 of the Qualified Dividends and Capital Gen Tax. Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schodule D Tax Worksheet in the instructions for Schodule D From 1040, whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax enter -0.  45 Subtract line 44 from line 43. If zero or less, enter -0.  46 Enter the smaller of line 36 or line 37.  47 Enter the smaller of line 45 or line 46.  48 Subtract line 47 from ling 46.  49 Multiply line 48 by 15% (15).  49 Multiply line 48 by 15% (15).  49 Multiply line 48 by 15% (25).  50 Subtract line 46 from line 40.  51 Multiply line 50 by 25% (.25).  52 Add lines 42, 49, and 51.  53 If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.  54 Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter	43	An entertible.		
Worksheet in the instructions for Form 1040, line 44, or the amount form and 14 of the Schedule D 175 m 140 of the Schedule D 140 of the Sch	5.50	<ul> <li>\$69,000 if married filing jointly or qualifying widow(er).</li> <li>\$34,500 if single or married filing separately, or</li> </ul>		
46 Enter the smaller of line 36 or line 37  46 11, 515, 850.  47  48 Subtract line 47 from line 46  49 1, 727, 378.  49 Multiply line 48 by 15% (15)  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  50 Subtract line 46 from line 40  51 Multiply line 50 by 25% (.25)  52 3, 213, 051.  53 If line 36 is \$175,000 or less (\$87,500 or less if married filling separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filling separately) from the result  53 4, 710, 111.  54 Enter the smaller of line 52 or line 53 here and on line 31. If you are filling Form 2555 or 2555-EZ, do not enter	44	Worksheet in the instructions for Form 1040, line 44, or the amount from the 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		
46 Enter the smaller of line 36 or line 37  46 11, 515, 850.  47  48 Subtract line 47 from line 46  49 1, 727, 378.  49 Multiply line 48 by 15% (15)  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  49 1, 727, 378.  50 Subtract line 46 from line 40  51 Multiply line 50 by 25% (.25)  52 3, 213, 051.  53 If line 36 is \$175,000 or less (\$87,500 or less if married filling separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filling separately) from the result  53 4, 710, 111.  54 Enter the smaller of line 52 or line 53 here and on line 31. If you are filling Form 2555 or 2555-EZ, do not enter	45	Subtract line 44 from line 43. If zero or less, enter -0-		
48 Subtract line 47 from line 46	46	新 単		
49 Multiply line 48 by 15% (15)	47	Enter the smaller of line 45 or line 46		
If line 38 is zero or blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.         50       Subtract line 46 from line 40         50           51       Multiply line 50 by 25% (.25)         51           52       Add lines 42, 49, and 51.         52         3, 213, 051.         53       If line 36 is \$175,000 or less (\$87,500 or less if married filling separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filling separately) from the result.       STMT 27           54       Enter the smaller of line 52 or line 53 here and on line 31. If you are filling Form 2555 or 2555-EZ, do not enter	48	Subtract line 47 from line 46 48 11, 515, 850.		
50 Subtract line 46 from line 40	49	Multiply line 48 by 15% (15)	49	1,727,378.
51 Multiply line 50 by 25% (.25)  52 Add lines 42, 49, and 51.  53 If line 36 is \$175,000 or less (\$87,500 or less if married filling separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filling separately) from the result.  54 Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter		If line 38 is zero or blank, skip lines 50 and 51 and go to line 52. Otherwise, go to line 50.		
52 3, 213, 051.  53 If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	50	Subtract line 46 from line 40		
If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	51	Multiply line 50 by 25% (.25)	51	
multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result 53 4,710,111.	52	Add lines 42, 49, and 51, , ,	52	3,213,051.
54 Enter the smaller of line 52 or line 53 here and on line 31. If you are filing Form 2555 or 2555-EZ, do not enter	53			STMT 27
700 00 100 00 100 00 100 00 100 00 100 00	54		53	4,710,111.
			54	3,213,051.

Department of the Treasury Internal Revenue Service (99)

# Investment Interest Expense Deduction

Attach to your tax return.

OMB No. 1545-0191

Sequence No. 51

NONE

46,033.

Identifying number Name(s) shown on return WILLARD M ROMNEY & ANN D ROMNEY Total Investment Interest Expense Part I Investment interest expense paid or accrued in 2011 (see instructions), SEE, STATEMENT, 28. 46,033. 46,033. Net Investment Income Part II 4a Gross income from property held for investment (excluding any net 7,268,023. 4a 4 c 10,699,269 d Net gain from the disposition of property held for investment . . . . . . . e Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment (see instructions) . . . . . . . . . . . . 4e ,090,082. 4f g Enter the amount from lines 4b and 4e that you elect to include in investment income (see instructions)......SEE.STATEMENT.29. 4g NONE 6,452,352. 4h 71,978. 5 380,374. Part III Investment Interest Expense Deduction Disallowed investment interest expense to be carried forward to 2012. Subtract line 6 from

Section references are to the Internal Revenue Code unless otherwise noted.

## General Instructions

#### Purpose of Form

Use Form 4952 to figure the amount of investment interest expense you can deduct for 2011 and the amount you can carry forward to future years. Your investment interest expense deduction is limited to your net investment income.

For more information, see Pub. 550, Investment Income and Expenses.

#### Who Must File

If you are an individual, estate, or a trust you must file Form 4952 to claim a deduction for your investment interest expense. Exception. You do not have to file Form

4952 if all of the following apply.

- Your investment income from interest and ordinary dividends minus any qualified dividends is more than your investment interest expense.
- · You do not have any other deductible investment expenses.
- You do not have any carryover of disalfowed investment interest expense from

#### Allocation of Interest Expense

If you paid or accrued interest on a loan and used the loan proceeds for more than one purpose, you may have to allocate the interest. This is necessary because different

rules apply to investment interest personal interest, trade of business interest, home mortgage interest, and passive activity interest. See Pub. 535, Business Expenses.

# Specific Instructions

#### Part I - Total Investment Interest Expense

line 3. If zero or less, enter -0Investment interest expense deduction. Enter the smaller of line 3 or 6. See instructions

Line 1

Enter the investment interest expense paid or accrued during the tax year, regardless of when you incurred the indebtedness. investment interest expense is interest paid or accrued on a loan or part of a loan that is allocable to property held for investment (as defined on this page).

Include investment interest expense reported to you on Schedule K-1 from a partnership or an S corporation. Include amortization of bond premium on taxable bonds purchased after October 22, 1986, but before January 1, 1988, unless you elected to offset amortizable bond premium against the interest payments on the bond. A taxable bond is a bond on which the interest is includible in gross income.

Investment interest expense does not include any of the following:

- Home mortgage interest.
- Interest expense that is properly allocable to a passive activity. Generally, a passive activity is any trade or business activity in which you do not materially participate and any rental activity. See the Instructions for Form 8582, Passive Activity Loss Limitations,

- Any interest expense that is capitalized, such as construction interest subject to section 263A.
- Interest expense related to tax-exempt interest income under section 265.
- Interest expense, disallowed under section. 264, on indebtedness with respect to life insurance, endowment, or annuity contracts issued after June 8, 1997, even if the proceeds were used to purchase any property held for investment.

Property held for investment. Property held for investment includes property that produces income, not derived in the ordinary course of a trade or business, from interest, dividends, annuities, or royalties. It also includes property that produces gain or loss, not derived in the ordinary course of a trade or business, from the disposition of property that produces these types of income or is held for investment. However, it does not include an interest in a passive activity.

Exception. A working interest in an oil or gas property that you held directly or through an entity that did not limit your liability is property held for investment, but only if you did not materially participate in the activity.

#### Part II - Net Investment Income

Line 4a

Gross income from property held for investment includes income, unless derived in the ordinary course of a trade or business, from interest, ordinary dividends (except Alaska Permanent Fund dividends), annuities, and royalties. Include investment income

For Paperwork Reduction Act Notice, see back of form.

Form 4952 (2011)

Department of the Treasury

Internal Revenue Service (99)

# Investment Interest Expense Deduction

Attach to your tax return.

OMB No. 1545-0191

Attachment Sequence No. 51

NONE

46,033.

Identifying number Name(s) shown on return WILLARD M ROMNEY & ANN D ROMNEY Total Investment Interest Expense Part I Investment interest expense paid or accrued in 2011 (see instructions).......... 46,033. Disallowed investment interest expense from 2010 Form 4952, line 7 46,033. Part II Net Investment Income 4a Gross income from property held for investment (excluding any net 4a 7,268,023. 10,699,269% d Net gain from the disposition of property held for investment . . . . . . . e Enter the smaller of line 4d or your net capital gain from the disposition of property held for investment (see instructions) 4e 9,609, 187. 1,090,082. g Enter the amount from lines 4b and 4e that you elect to include in investment income (see instructions)......SEE.STATEMENT.32. NONE 6, 452, 352. 4h Investment expenses (see instructions)

Section references are to the Internal Revenue Code unless otherwise noted.

## General Instructions

#### Purpose of Form

Part III

Use Form 4952 to figure the amount of investment interest expense you can deduct for 2011 and the amount you can carry forward to future years. Your investment interest expense deduction is limited to your net investment income.

For more information, see Pub. 550, Investment Income and Expenses.

#### Who Must File

If you are an individual, estate, or a trust you must file Form 4952 to claim a deduction for your investment interest expenses

Exception. You do not have to (#Form 4952 if all of the following apply.

- Your investment income from interest and ordinary dividends minus any qualified dividends is more than your investment interest expense.
- You do not have any other deductible investment expenses
- You do not have any carryover of disallowed investment interest expense from

#### Allocation of Interest Expense

If you paid or accrued interest on a loan and used the loan proceeds for more than one purpose, you may have to allocate the interest. This is necessary because different

rules apply to investment interest personal interest, trade of business interest, home mortgage interest, and passive activity Interest. See Pub. 535, Business Expenses.

# Specific Instructions

### Part I - Total Investment Interest Expense

Net investment income. Subtract line 5 from line 4h. If zero or less, enter -0. SEE. STMT. 34.

Disallowed investment interest expense to be carried forward to 2012. Subtract line 6 from

line 3. If zero or less, enter -0Investment interest expense deduction. Enter the smaller of line 3 or 6. See instructions

Investment Interest Expense Deduction

Enter the investment interest expense paid or accrued during the tax year, regardless of When you incurred the indebtedness. dñvestment interest expense is interest paid or accrued on a loan or part of a loan that is allocable to property held for investment (as defined on this page).

Include investment interest expense reported to you on Schedule K-1 from a partnership or an S corporation, Include amortization of bond premium on taxable bonds purchased after October 22, 1986, but before January 1, 1988, unless you elected to offset amortizable bond premium against the interest payments on the bond. A taxable bond is a bond on which the interest is includible in gross income.

Investment interest expense does not include any of the following:

- Home mortgage interest.
- Interest expense that is properly allocable to a passive activity. Generally, a passive activity is any trade or business activity in which you do not materially participate and any rental activity. See the Instructions for Form 8582, Passive Activity Loss Limitations,

- Any interest expense that is capitalized, auch as construction interest subject to section 263A.
- Interest expense related to tax-exempt interest income under section 265.
- Interest expense, disallowed under section 264, on indebtedness with respect to life insurance, endowment, or annuity contracts issued after June 8, 1997, even if the proceeds were used to purchase any property held for investment.

Property held for investment. Property held for investment includes property that produces income, not derived in the ordinary course of a trade or business, from interest, dividends, annuities, or royalties. It also includes property that produces gain or loss, not derived in the ordinary course of a trade or business, from the disposition of property that produces these types of income or is held for investment. However, it does not include an interest in a passive activity.

Exception. A working interest in an oil or gas property that you held directly or through an entity that did not limit your liability is property held for investment, but only if you did not materially participate in the activity.

#### Part II - Net Investment Income

#### Line 4a

Gross income from property held for investment includes income, unless derived in the ordinary course of a trade or business, from interest, ordinary dividends (except Alaska Permanent Fund dividends), annuities, and royalties. Include investment income

For Paperwork Reduction Act Notice, see back of form.

Form 4952 (2011)

1X3000 2.000

THE TAXPAYERS EXPECT TO HAVE A FORM 8621 FILING REQUIREMENT IN 2011; HOWEVER INFORMATION IS NOT CURRENTLY AVAILABLE OR ESTIMABLE AT THIS TIME.

# Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund

OMB	No,	1545-	100
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(Rev. December 2011) Department of the Treasury Internal Revenue Service

► See separate instructions.

Attachment Sequence No. 69

Numbe	LARD M ROMNEY	
	er, street, and room or suite no. (If a P.O. box, see instructions.)  Shareholder tax year: calendar year 20:	11 or other tax year
		dending
	town, state, and ZIP code or country	
	MONT, MA USA	
	type of shareholder filing the return: X Individual Corporation Partnership S Corporation of passive foreign investment company (PFIC) or qualified electing fund (QEF) Employer identification number (if any)	Nongrantor Trust Esta
		ACTUAL VALUE
	OR YEAR FILING REQUIREMENT ss (Enter number, street, city or town, and country.)  Tay year of company or find: calendar w	THE PROPERTY OF THE PARTY OF TH
	ss (Enter number, street, city or town, and country.)  Tax year of company or fund: calendar year tax year beginning	36F VO. 15h
	ending	and and
Par		er 'skywereta
Α	Election To Treat the PFIC as a QEF. I, a shareholder of a PFIC, elect to treat the PFIC as a QEF. Complete lines	to through 2c of Dart II
в	Deemed Sale Election. I, a shareholder on the first day of a PFIC's first tax year as a QEF, elect to recognize gair interest in the PFIC. Enter gain or loss on line 10f of Part IV.	VIII
С	Deemed Dividend Election. I, a shareholder on the first day of a PFIC's first tax year as a QEF that is a controlled elect to treat an amount equal to my share of the post-1986 earnings and profits of the CEC as an excess distribution of Part IV.	foreign corporation (CFC), ation. Enter this amount on
D [	Election To Extend Time For Payment of Tax. I, a shareholder of a QEF, elect to extend the time for payment of earnings and profits of the QEF until this election is terminated. Complete lines 3a through ac of Part II to calcula	of tax on the undistributed the tax that may be deferred
Εſ	Note: If any portion of line 1a or line 2a of Part II is includible under section 951, you may not make this election.  Also, see sections 1294(c) and 1294(f) and the related regulations for events that terminate this election.  Election To Recognize Gain on Deemed Sale of PFIC. I, a shareholder of a former PFIC of a PFIC to which sect	ion 1297(d) applies, elect to
F [	treat as an excess distribution the gain recognized on the deemed sale of my interest in the PFIC, or, if I qualify, nearnings and profits deemed distributed, on the last day of its last tax year as a PFIC under section 1297(a). Enter Election To Mark-to-Market PFIC Stock. I, a shareholder of a PFIC, elect to mark-to-market the PFIC stock that if	or gain on line 10f of Part IV.
G	Deemed Dividend Election With Respect to a Section 1297(e) PFIC. 1, a shareholder of a section 1297(e) PFIC	C within the meaning of
Г	the stock of the Section 1.1297-9(j)(2)(v), elect to make a deemed dividend election with respect to the Section 1.29 the stock of the Section 1.297(e) PFIC includes the CFC qualification date, as defined in Regulations section 1.129	7(e) PFIC. My holding period in 97-3(d).
н	Deemed Dividend Election With Respect to a Former PFIC. 1, a shareholder of a former PFIC, within the meaning 1.1291-9(j)(2)(iv), elect to make a deemed dividend election with respect to the former PFIC. My holding period includes the termination date, as defined in Regulations section 1.1298-3(d).	ng of Regulations section in the stock of the former PFIC
Par	Income From a Qualified Electing Fund (QEF). All QEF shareholders complete lines 1a the Election D, also complete lines 3a through 4c. (See instructions)	rough 2c. If you are making
1 a	Enter your pro rata share of the ordinary earnings of the QEF	
1a b	Enter the portion of line 1a that is included mancome under section 951 or that	
	Enter the portion of line 1a that is included mancome under section 951 or that may be excluded under section 1293(g)	
	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1283(g)	1c
b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)	1c
b	Enter the portion of line 1a that is included microome under section 951 or that may be excluded under section 1293(g)	1c
b c 2a b	Enter the portion of line 1a that is included microome under section 951 or that may be excluded under section 1293(g)	1c
b c 2a	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)	
b c 2 a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)	2c
b c 2a b c	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)	
c 2a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF	2c
b c 2a b c	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF.  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1c and 2c.  Enter the total amount of cash and the fair market value of other property distributed or deemed distributed to you during the tax year of the QEF. (See instructions.)  Enter the portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the	2c
b c 2a b c 3a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)  Subtract line 1b from line 1a: Enter this amount on your tax return as ordinary income Enter your pro rata share of the total net capital gain of the QEF.  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g)  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1c and 2c.  Enter the total amount of cash and the fair market value of other property distributed on deemed distributed to you during the tax year of the QEF. (See instructions.)  Enter the portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year.  3c	2c 3a
b c 2a b c 3a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g)  Subtract line 1b from line 1a! Enter this amount on your tax return as ordinary income Enter your pro rata share of the fotal net capital gain of the QEF.  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g)  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1c and 2c.  Enter the total amount of cash and the fair market value of other property distributed or deemed distributed to you during the tax year of the QEF. (See instructions.)  Benter the portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year.  Add lines 3b and 3c.	2c 3a
b c 2a b c 3a b	Enter the portion of line 1a that is included migroome under section 951 or that may be excluded under section 1293(g).  Subtract line 1b from line 1a! Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF. 2a  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g). 2b  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1c and 2c.  Enter the total amount of cash and the fair market value of other property distributed on deemed distributed to you during the tax year of the QEF. (See instructions.) 3b  Enter the portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year. 3c  Add lines 3b and 3c.  Subtract line 3d from line 3a, and enter the difference (if zero or less, enter amount in brackets)  Important: If line 3e is greater than zero, and no portion of line 1a or 2a is includible in income under section	2c 3a
b c 2a b c 3a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF.  Enter the portion of Jipe 2a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1b and 2c.  Enter the portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year.  Add lines 3b and 3c.  Subtract line 3d from line 3a, and enter the difference (if zero or less, enter amount in brackets)  Important: If line 3e is greater than zero, and no portion of line 1a or 2a is includible in income under section 951, you may make Election D with respect to the amount on line 3e.	2c 3a
b c 2a b c d e 4a	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1283(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF.  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1b and 2c.  Enter the total amount of cash and the fair market value of other property distributed on the first portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year.  Add lines 3b and 3c.  Subtract line 3e is greater than zero, and no portion of line 1a or 2a is includible in income under section 951, you may make Election D with respect to the amount on line 3e.  Enter the total tax for the tax year (See instructions.)  4a	2c 3a
b c 2a b c d e	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1233(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF	2c 3a
b c 2a b c d e 4a b	Enter the portion of line 1a that is included in income under section 951 or that may be excluded under section 1283(g).  Subtract line 1b from line 1a. Enter this amount on your tax return as ordinary income.  Enter your pro rata share of the total net capital gain of the QEF.  Enter the portion of line 2a that is included in income under section 951 or that may be excluded under section 1293(g).  Subtract line 2b from line 2a. This amount is a net long-term capital gain. Enter this amount in Part II of the Schedule D used for your income tax return. (See instructions.)  Add lines 1b and 2c.  Enter the total amount of cash and the fair market value of other property distributed on the first portion of line 3a not already included in line 3b that is attributable to shares in the QEF that you disposed of, pledged, or otherwise transferred during the tax year.  Add lines 3b and 3c.  Subtract line 3e is greater than zero, and no portion of line 1a or 2a is includible in income under section 951, you may make Election D with respect to the amount on line 3e.  Enter the total tax for the tax year (See instructions.)  4a	2c 3a

Form 8	321 (Rev. 12-2011) WILLARD M ROMNEY	Page	2
Part	Gain or (Loss) From Mark-to-Market Election (See instructions.)		
5a	Enter the fair market value of your PFIC stock at the end of the tax year	5a	_
b	Enter your adjusted basis in the stock at the end of the tax year	5b	_
C	Subtract line 5b from line 5a. If a gain, do not complete lines 6 and 7. Include this amount as ordinary income		
	on your tax return. If a loss, go to line 6	5c	_
6	Enter any unreversed inclusions (as defined in section 1296(d))	6	_
7	Enter the loss from line 5c, but only to the extent of unreversed inclusions on line 6. Include this amount as an		
	ordinary loss on your tax return	7	
8	If you sold or otherwise disposed of any section 1296 stock (see instructions) during the tax year:		
а	Enter the fair market value of the stock on the date of sale or disposition	8a	
b	Enter the adjusted basis of the stock on the date of sale or disposition	8b 📆	_
C	Subtract line 8b from line 8a. If a gain, do not complete line 9. Include this amount as ordinary income on your	The state of the s	
	tax return. If a loss, go to line 9	8C	
9 a	Enter any unreversed inclusions (as defined in section 1296(d))	9a 1	
b	Enter the loss from line 8c, but only to the extent of unreversed inclusions on line 9a. Include this amount as an ordinary loss on your tax return. If the loss on line 8c exceeds unreversed inclusions on line 9a, complete line 9c.	Langue .	
	ordinary loss on your tax return. If the loss on line 8c exceeds unreversed inclusions on line 9a, complete line 9co		_
С	Enter the amount by which the loss on line 8c exceeds unreversed inclusions on line 9a. Include this amount on		
	your tax return according to the rules generally applicable for losses provided elsewhere in the Code and	AF AF	
	regulations	9c	
	Note. See instructions in case of multiple dispositions.		_
Part		ions.)	
	Complete a separate Part IV for each excess distribution (see instructions).		_
10a	Enter your total distributions from the section 1291 fund during the current tax year with respect to the	0.20	
10	applicable stock. If the holding period of the stock began in the current tax year, see instructions	10a	_
b	Enter the total distributions (reduced by the portions of such distributions that were excess distributions but		
	not included in income under section 1291(a)(1)(B)) made by the fund with respect to the applicable stock for		
	each of the 3 years preceding the current tax year (or if shorter, the portion of the shareholder's holding period	l	
	before the current tax year)	10b	_
C	Divide line 10b by 3. (See instructions if the number of preceding tax years is less than 3.)	10c	-
d	Multiply line 10c by 125% (1.25)  Subtract line 10d from line 10a. This amount, if more than zero, is the excess distribution with respect to the	10d	_
е	applicable stock. If zero or less and you did not dispose of stock during the tax year, do not complete the		
	rest of Part IV. See instructions if you received more than one distribution during the current tax year. Also,		
	see instructions for rules for reporting a nonexcess distribution on your income tax return	10e	
f	Enter gain or loss from the disposition of stock of a section 1291 fund or former section 1291 fund. If a gain,	106	_
	complete line 11. If a loss, show it in brackets and do not complete line 11	10f	
11a	Attach a statement for each distribution and disposition. Show your holding period for each share of stock or	101	-
	block of shares held. Allocate the excess distribution to each day in your holding period. Add all amounts that		
	are allocated to days in each tax year.		
b	Enter the total of the amounts determined in line 11a that are allocable to the current tax year and tax years before the		
~	foreign corporation became a PEIC (pre-PFIC tax years). Enter these amounts on your income tax return as other income	116	
С	Enter the aggregate increases in tax (before credits) for each tax year in your holding period (other than the		_
	current tax year and pre-PFIC years). (See instructions.)	11c	
d	Foreign tax credit. (See instructions.)	11d	_
e	Subtract line #1d from line 11c. Enter this amount on your income tax return as "additional tax." (See instructions.)	110	_
f	Determine interest on each net increase in tax determined on line 11e using the rates and methods of section		_
	6621. Enter the aggregate amount of interest here. (See instructions.)	111	

Part V Status of Prior Year Section 1294 Elections and Termination of Section 1294 Elections

Complete a separate column for each outstanding election. Complete lines 9 and 10 only if there is a partial termination of the section 1294 election.

	(i)	(ii)	(iii)	(iv)	(v)	(vi)
Tax year of outstanding	10000	A. A	1			
election						
! Undistributed earnings to						
which the election relates						
3 Deferred tax						
4 Interest accrued on deferred						The same
tax (line 3) as of the filing date						255 255
0.0110				1	4	PARKET TO THE PARKET OF THE PA
5 Event terminating election		379,527	100000000000000000000000000000000000000		3860x 48	100
6 Earnings distributed or						4
deemed distributed during					THE WHITE STATE OF THE PARTY OF	704
The tax year					- 100 CO	
7 Deferred tax due with this				. 4	# W	
return				.95.	\$5. <u>\$</u>	
8 Accrued interest due with this					,4000bh.	
return				A 18		
Deferred tax outstanding after				- EX AS		
partial termination of election				other the second		
Interest accrued after partial			1			
termination of election			200	497 HP		8621 (Rev. 1

Installment Sale Income

Attach to your tax return.
 Use a separate form for each sale or other disposition of property on the installment method.

OMB No. 1545-0228

Department of the Treasury Internal Revenue Service

Name(s) shown on return

Attachment Sequence No. 79 Identifying number

WI	LLARD M ROMNEY & ANN D ROMNEY		
1			
2 a	Date acquired (mm/dd/yyyy) ▶ b Date sold (mm/dd/yyyy) ▶		
3	Was the property sold to a related party (see instructions) after May 14, 1980? If "No," skip line 4		. Yes X No
4	Was the property you sold to a related party a marketable security? If "Yes," complete Part III. If "No,"		
	complete Part III for the year of sale and the 2 years after the year of sale		Yes No
Pa	Gross Profit and Contract Price. Complete this part for the year of sale only.		100
5	Selling price including mortgages and other debts. Do not include interest, whether stated or unstated	5	Children Ch
6	Mortgages, debts, and other liabilities the buyer assumed or took the		A STATE OF THE PARTY OF THE PAR
	property subject to (see instructions) 6		
7	Subtract line 6 from line 5		Suggisting.
8	Cost or other basis of property sold		  ⊈},
9	Depreciation allowed or allowable		
10	Adjusted basis. Subtract line 9 from line 8		
11	Commissions and other expenses of sale		
12	Income recapture from Form 4797, Part III (see instructions)		
13	Add lines 10, 11, and 12	13	
14	Subtract line 13 from line 5. If zero or less, do not complete the rest of this form (see instructions)	14	
15			
	gain (see instructions). Otherwise, enter -0	15	
	Gross profit. Subtract line 15 from line 14	16	100
17	-A-10-000	17	
	Contract price. Add line 7 and line 17		e a navment or have
. i	Installment Sale Income. Complete this part for the year of sale and any year you re certain debts you must treat as a payment on installment obligations.	COCIO	e a payment or nave
10	Gross profit percentage (expressed as a decimal amount). Divide line 16 by line 18. For years after		
13	the year of sale, see instructions	19	0.91011429
20	If this is the year of sale, enter the amount from time 17 Otherwise, enter-0-	20	0. 51011425
21	Payments received during year (see instructions). Do not include interest, whether stated or unstated	21	1,000.
22	Add lines 20 and 21	22	1,000.
23	Payments received in prior years (see instructions). Do not include		.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	interest, whether stated or unstated 3, 013.		
24	Installment sale income. Multiply line 22 by line 19		910.
25	Enter the part of line 24 that is ordinary income under the recapture rules (see instructions)	$\overline{}$	
26	Subtract line 25 from line 24 Enter here and on Schedule D or Form 4797 (see instructions)	26	910.
Pa	rt III Related Party Installment Sale Income. Do not complete if you received the final payr	ment	this tax year.
27	Name, address, and taxpayer identifying tramber of related party		
28	Did the related party resell or dispose of the property ("second disposition") during this tax year?		Yes No
29	If the answer to question 28 is "Yes," complete lines 30 through 37 below unless one of the following conditions is me	t. Che	ck the box that applies.
а	Teb.		
	marketable securities). If this box is checked, enter the date of disposition (mm/dd/yyyy)		
b	The Villa		
С	——————————————————————————————————————	the f	irst disposition.
d			
е		ıı pur	pose for either of the
	dispositions. If this box is checked, attach an explanation (see instructions).	20	I
30	Selling price of property sold by related party (see instructions)	30	
31	Enter contract price from line 18 for year of first sale	31	
32	Enter the smaller of line 30 or line 31	-	
33 34	Total payments received by the end of your 2011 tax year (see instructions)	34	
	Multiply line 34 by the gross profit percentage on line 19 for year of first sale	35	
36		36	
37	Subtract line 36 from line 35. Enter here and on Schedule D or Form 4797 (see instructions)	37	
_	Paperwork Reduction Act Notice, see page 4.	,	Form 6252 (2011)
JSA	900 1.00		, , , , , , , , , , , , , , , , , , , ,

# 6781

## Gains and Losses From Section 1256 Contracts and Straddles

OMB No. 1545-0644

Department of the Treasury Attachment Attach to your tax return. Sequence No. 82 Internal Revenue Service Name(s) shown on tax return Identifying number WILLARD M ROMNEY & ANN D ROMNEY Check all applicable boxes (see instructions). Mixed straddle election C Mixed straddle account election Straddle-by-straddle identification election D Net section 1256 contracts loss election Section 1256 Contracts Marked to Market Part I (a) Identification of account (b) (Loss) (c) Gain 1 THE ANN & MITT ROMNEY 1995 FAMILY TRUST **1**275,355. 130,016. THE ANN D. ROMNEY BLIND TRUST IIO. 190. THE W. MITT ROMNEY BLIND TRUST £415,561. 學學學學 415,561. 4% 415,561. Note: If line 5 shows a net gain, skip line 6 and enter the gain on line 7. Partnerships and S corporations, see instructions. 6 If you have a net section 1256 contracts loss and checked box D above, enter the amount of loss to be 415,561. Short-term capital gain or (loss). Multiply line 7 by 40% (.40). Enter here and include on the appropriate line 166,224. Long-term capital gain or (loss). Multiply line 7 by 60% (.60). Enter here and include on the appropriate line 249,337. Part II Gains and Losses From Straddles. Attach a separate schedule listing each straddle and its components. Section A - Losses From Straddles (h) Recognized loss. (e) Cost or (g) if column (e) (b) Date Unrecognized other basis if column (f) is more is more than (c) Date entered (d) Gross plus gain on than (g), enter (a) Description of property (d), enter closed out offsetting into or sales price. expense of difference. difference. or said: acquired Otherwise, enter -0sale positions Otherwise, 10 11a Enter the short-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions) 11a b Enter the long-term portion of losses, from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions) Section B - Gains From Straddles (f) Gain. If column (b) Date (c) Date (e) Cost or other (d) Gross (d) is more than (e), entered (a) Description of property basis plus closed out sales price enter difference. into or expense of sale Otherwise, enter -0acquired 12 13a Enter the short-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D. (see instructions) b Enter the long-term portion of gains from line 12, column (f), here and include on the appropriate line of Unrecognized Gains From Positions Held on Last Day of Tax Year. Memo Entry Only (see instructions) (e) Unrecognized gain. If column (c) is more (d) Cost or other basis (b) Date (c) Fair market value on last (a) Description of property than (d), enter difference. acquired business day of tax year as adjusted Otherwise, enter -0-14

For Paperwork Reduction Act Notice, see page 4.

Form 6781 (2011)

(Rev. December 2005)

Department of the Treasury

Internal Revenue Service

Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)

(For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)

OMB No. 1545-0790

Attachment

➤ See separate instructions.

Sequence No. 84

Name(s) shown on return Identifying number WILLARD M ROMNEY & ANN D ROMNEY General Information Part I 1 Check boxes that apply: (a) X Notice of inconsistent treatment Administrative adjustment request (AAR) If you are a tax matters partner (TMP) filing an AAR on behalf of the pass-through entity, are you 3 Identify type of pass-through entity: (a) Partnership (b) Electing large partnership (c) S corporation (d) X Trust (f) Employer identification number of pass-through entity Tax shelter registration number (if applicable) of pass-through entity Name, address, and ZIP code of pass-through entity Internal Revenue Service Center where pass-through entity filed its return MITT ROMNEY 1996 CRUT BRADFORD MALT, TRUSTEE Tax year of pass-through entity -01/01/2011 to 12/31/2011 800 BOYLSTON STREET BOSTON, MA 02199-3600 Your tax year 01/01/2011 to 12/31/2011 Inconsistent or Administrative Adjustment Request (AAR) Items (b) Inconsistency is in, (ctiAmount as shown on or AAR is to correct Schedule K-1, Schedule (a) Description of inconsistent or (check boxes that (e) Difference Q, or similar statement, a (d) Amount you apply) administrative adjustment request (AAR) items foreign trust statement, between are reporting or your return, whichever (see instructions) Amount of Treatment (c) and (d) applies (see Instructions) of item 10 11 12 Explanations - Enter the Part II item number before each explanation. If more space is needed, continue your explanations on the back. 2011 SCHEDULE K-1 INFORMATION IS UNAVAILABLE AT THIS TIME. ALL INFORMATION ON THIS IN PROCESS RETURN IS ESTIMATED AND MAY CHANGE SIGNIFICANTLY WHEN THE FINAL 2011 K-1 IS RECEIVED. For Paperwork Reduction Act Notice, see separate instructions. Form 8082 (Rev. 12-2005)

JSA

(Rev. December 2005)

Department of the Treasury Internal Revenue Service

# Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR) (For use by partners, S corporation shareholders, estate and domestic trust beneficiaries,

For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)

> See separate instructions.

OMB No. 1545-0790

Attachment

Sequence No. 84

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Name(s) shown on return				Identifyin	gnumber
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Part I General Information					
1 Check boxes that apply: (a) X Notice of inconsistent t	reatment	(b)	Administrative adjust	tment request (AAR)	
2 If you are a tax matters partner (TMP) filing an AAR on					
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For Paperwork Reduction Act Notice, see separate instru	ctions.			Form	8082 (Rev. 12-2005)

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(Rev. December 2005)

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Department of the Treasury Internal Revenue Service

# Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR) (For use by partners, S corporation shareholders, estate and domestic trust beneficiaries,

For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)

> See separate instructions.

OMB No. 1545-0790

Attachment Sequence No. 84

Name(s) shown on return	e(s) shown on return				
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5 Name, address, and ZIP code of pass-through entity THE ANN AND MITT ROMNEY 1995 FT	/ Intern	Internal Revenue Service Center where pass through entity filed its rel			
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# 8082

(Rev. December 2005)

Department of the Treasury

## Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)

(For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)

OMB No. 1545-0790

Attachment

Form 8082 (Rev. 12-2005)

Sequence No. 84 Internal Revenue Service See separate instructions. Identifying number Name(s) shown on return WILLARD M ROMNEY & ANN D ROMNEY General Information Check boxes that apply: (a) X Notice of inconsistent treatment Administrative adjustment request (AAR) 2 If you are a tax matters partner (TMP) filing an AAR on behalf of the pass-through entity, are you 3 Identify type of pass-through entity: Partnership (b) Electing large partnership (c) S corporation (d) Estate X Truste (f) Tax shelter registration number (if applicable) of pass-through entity Employer identification number of pass-through entity Internal Revenue Service Center where pass through entity filed its return Name, address, and ZIP code of pass-through entity THE ANN D. ROMNEY BLIND TRUST Tax year of pass-through entity BRADFORD MALT, TRUSTEE 901/01/2011 to 12/31/2011 ROPES & GRAY, 800 BOYLSTON STREET BOSTON, MA 02199 9 Your tax year /2011 to 12/31/2011 Inconsistent or Administrative Adjustment Request (AAR) Items (b) Inconsistency is in, (c) Amount as shown on or AAR is to correct Schedule K-1, Schedule (a) Description of inconsistent or (check boxes that (e) Difference D, or similar statement, a (d) Amount you apply) between administrative adjustment request (AAR) items foreign trust statement, are reporting or your return, whichever (c) and (d) Amount of Treatment (see instructions) applies (see instructions) of item 10 11 12 13 Explanations - Enter the Part II item number before each explanation. If more space is needed, continue your explanations on the back. 2011 SCHEDULE K-1 INFORMATION IS UNAVAILABLE AT THIS TIME. ALL INFORMATEON ON THIS IN PROCESS RETURN IS ESTIMATED AND MAY CHANGE SIGNIFICANTLY WHEN THE FINAL 2011 K-1 IS RECEIVED.

For Paperwork Reduction Act Notice, see separate instructions.

(Rev. December 2005)

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Department of the Treasury Internal Revenue Service

# Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)

(For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)
▶ See separate instructions.

OMB No. 1545-0790

Attachment

Sequence No. 84

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# 8082

(Rev. December 2005)

Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)

(For use by partners, S corporation shareholders, estate and domestic trust beneficiaries, foreign trust owners and beneficiaries, REMIC residual interest holders, and TMPs)

OMB No. 1545-0790

Attachment

Department of the Treasury

ntemal Revenue Service	► Se	ee separate inst	uctions.		Sequence No. 6
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#### **Passive Activity Loss Limitations**

➤ See separate instructions.
 ➤ Attach to Form 1040 or Form 1041.

OMB No. 1545-1008

2011

Attachment Sequence No. 88

Name(s) shown on return

Department of the Treasury Internal Revenue Service (99)

Identifying number

	JARD M ROMNEY & ANN D ROMNEY		
Part	2011 Passive Activity Loss Caution: Complete Worksheets 1, 2, and 3 before completing Part I.		
Renta	Real Estate Activities With Active Participation (For the definition of active participation, see	253	
	al Allowance for Rental Real Estate Activities in the instructions.)	13,000	
1a	Activities with net income (enter the amount from Worksheet 1,	P(2.0)(3)	
	column (a))	G.	
b	Activities with net loss (enter the amount from Worksheet 1, column		11030 122 1 20 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
-		28,18	
c	(b)). The state of the amount from Worksheet 1, the state of the state	88.WG	
177	94 V		
d	column (c)) 1c (	10	SECURIO DE COMO DE LA PORTE DE CONTRACTOR DE
Comn	nercial Revitalization Deductions From Rental Real Estate Activities	391881	
2a	Commercial revitalization deductions from Worksheet 2, column (a)   2a   (	JURISS II	TOPAL TOPAL STATE OF THE STATE
	Prior year unallowed commercial revitalization deductions from	TANKS.	FIRE ALL THE STATE OF THE STATE
	Worksheet 2, column (b)	1163816	DANCE THE STATE OF
c	Add lines 2a and 2b	2 c	(
	ner Passive Activities	688002	
3a	Activities with net income (enter the amount from Worksheet 3	SEATIN	
	column (a)) 2, 626, 817.		
ь	Activities with net loss (enter the amount from Worksheet 3, column	188413	STANDON TO STANDON BONDE IN STANDON STANDON
	(b)) 3b ( 1,211.)	1300 HUS	
С	Prior years unallowed losses (enter the amount from Worksheet 3)	120 RE	
	column (c))	Steps	
d	Combine lines 3a, 3b, and 3c	3d	2,625,606.
4	Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with		
	your return; all losses are allowed, including any prior year unallowed losses entered on line 1c.		
	2b, or 3c. Report the losses on the forms and schedules normally used	4	2,625,606.
	If line 4 is a loss and: • Line 1d is a loss, go to Part II.	6 10	
	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> </ul>		
	<ul> <li>Line 3d:is:a loss (and lines 1d and 2c are zero or more), skip Parts II and III</li> </ul>	and g	go to line 15.
	on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.	the y	ear, do not complete
Part			
- Gir	Special Allowance for Rental Real Estate Activities With Active Participation  Note: Enter all numbers in Part II as positive amounts. See instructions for an example.		
-	The state of the s	5	
5	Enter the smaller of the loss on line 1d or the loss on line 4	72300	120 K25 COT TRACTION AND THE CO.
6	Enter \$150,000 If married filing separately, see instructions 6	鱺	Control Control
7	Enter modified adjusted gross income, but not less than zero (see instructions)  7		100 100 100 100 100 100 100 100 100 100
	Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.		
8	Subtract line 7 from line 6	35.000	
9	Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions	9	CONSTRUCTION OF THE PROPERTY O
10		10	
10	Enter the smaller of line 5 or line 9 If line 2c is a loss, go to Part III. Otherwise, go to line 15.		
Part	Special Allowance for Commercial Revitalization Deductions From Rental Real Estate	Acti	vities
	Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions		
11	Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	11	
12	Enter the loss from line 4	12	KONSTRUCTOR SOURCE
13	Reduce line 12 by the amount on line 10	13	
14	Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13	14	
Part			
15	Add the income, if any, on lines 1a and 3a and enter the total	15	2,626,817.
16	Total losses allowed from all passive activities for 2011. Add lines 10, 14, and 15, See		
ar Br	instructions to find out how to report the losses on your tax return	16	1, 211.
For Pa 36-3,000	perwork Reduction Act Notice, see instructions.		Form 8582 (2011)

	Curre	ent year		Prior ye	ars		Overall	gain or loss
Name of activity	(a) Net income (b) Net loss (line 1a) (line 1b)			(c) Unallowed loss (line 1c)		(d) Gain		(e) Loss
		200		<u> </u>			177-55 10	
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otal. Enter on Form 8582, lines						konska kasing a	DSX-4978	40
a, 1b, and 1c								TEM SUMPLESCREATESTS
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Name of activity	(a) Curre deductions	-	ur	(b) Pri nallowed ded	or year uctions		47	(c) Overall loss
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Managar & and day	Curre	entyear		Prior ye	ars		Overall	gain or loss
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SEE STATEMENT 35			(Spillsbur					
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Total. Enter on Form 8582, lines	valdida:	df d	-			ebaku bolin seji so ukon utan utan sebe	041000	NAMED OF STREET
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Norksheet 4 - Use this worksh	Form of schedule	ili	n on For	m 8582, IIne	10 or	14 (See II	ISTruct	
Name of activity	and line number to be reported on (see instructions)		Loss	(b) Ratio	D	(c) Sp allow:		(d) Subtract column (c) from column (a)
	William Company							
	NOOF COLUMN		575721 57272 -	93				NO. CO. CO. CO. CO. CO. CO. CO. CO. CO. C
Total				1.00				
Worksheet 5 Allocation of Una		See instru	ctions.)					
Name of activity	Form or so and line n to be repo	umber rted on	(a)	Loss		(b) Ratio		(c) Unallowed loss
	(see instru							
THE W. MITT ROMNEY B	LI SCH E,	33		1,211.	1.	000000	00	150000000000000000000000000000000000000
	9							
			1010					
					832	(6.03)		

Worksheet 6 - Allowed Losse	s (See instructions	5.)			
Name of activity		Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
THE W. MITT ROMNEY	Y BLIND S	CH E, 33	1,211.		1,211.
		-			entre in the second sec
Total	h Losses Penorte	d on Two or More F	1, 211.	es (See instructions	1, 211.
Name of activity:	(a)	(b)	(c) Ratio	(d) Unallowed	(e) Allowed loss
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule • b Net income from form or					
c Subtract line 1b from line 1a. If z	ero or less, enter -0-		The same of the sa		
Form or schedule and line number to be reported on (see instructions):					
1a Net loss plus prior year unallowed loss from form or schedule • b Net income from form or					
c Subtract line 1b from line 1a. If z	ero or less, enter -0-				
Form or schedule and line number to be reported on (see instructions):	50.				
1a Net loss plus prior year unallowed loss from form or schedule •  b Net income from form or					
schedule	emor less enter -0.				
Total			1.00		Form 8582 (2011

Passive Activity Loss Limitations

▶ See separate instructions.
 ▶ Attach to Form 1040 or Form 1041.

2011

OMB No. 1545-1008

Attachment Sequence No. 88

Name(s) shown on return

Department of the Treasury Internal Revenue Service (99)

Identifying number

Part			
	Caution: Complete Worksheets 1, 2, and 3 before completing Part I.		anasterakosiasakaisenisteisiasest
	I Real Estate Activities With Active Participation (For the definition of active participation, see al Allowance for Rental Real Estate Activities in the instructions.)	::0123	
	T I		
1a	Activities with net income (enter the amount from Worksheet 1,		
	column (a))	700000 700000	915068/359241859; # <b>6</b> 1015645 1
ь	Activities with net loss (enter the amount from Worksheet 1, column		
0.0	(b)) 1b (	XX83	
¢	Prior years unallowed losses (enter the amount from Worksheet 1,	\$21230	######################################
d	column (c)) Combine lines 1a, 1b, and 1c	1 d	THE STATE OF
	nercial Revitalization Deductions From Rental Real Estate Activities	6000	
	Commercial revitalization deductions from Worksheet 2, column (a) 2a (	EHROTOS.	
 b	Prior year unallowed commercial revitalization deductions from	EKELIE	
	Worksheet 2, column (b) 2b ( )	CHEERICA	
С	Add lines 2a and 2b	2c	(
	her Passive Activities	551833	
3a	Activities with net income (enter the amount from Worksheet 3		
	column (a)) 3a 2,626,818.		\$#XIDX#5 \$\\
b	Activities with net loss (enter the amount from Worksheet 3, column		
	(b)) 3b ( 1,211.)	enii.	e e merge rod pro Aliko Holesberio.
c	Prior years unallowed losses (enter the amount from Worksheet 3	PA S	A STATE OF THE STA
	column (c)) 3c (	325	LEST STATE OF THE
d	Combine lines 3a, 3b, and 3c	3 d	2,625,607.
4	Combine lines 1d, 2c, and 3d. If this line is zero or more, stop here and include this form with		
	your return; all losses are allowed, including any prior year unallowed losses entered on line 1c.		
	2b, or 3c. Report the losses on the forms and schedules normally used	4	2,625,607.
			-,,
	If line 4 is a loss and:   Line 1d is a loss, go to Part II.		2,020,000
	If line 4 is a loss and:  • Line 1d is a loss, go to Part II.  • Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.		
	<ul> <li>Line 2c is a Toss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III</li> </ul>	and g	go to line 15.
	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during</li> </ul>	and g	go to line 15,
Part I	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.</li> </ul>	and g	go to line 15,
	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.</li> <li>Special Allowance for Rental Real Estate Activities With Active Participation</li> </ul>	and g	go to line 15,
Part I	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.</li> </ul>	and g	go to line 15,
Part I	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.</li> <li>Special Allowance for Rental Real Estate Activities With Active Participation</li> </ul>	and g	go to line 15,
Part la Part	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.</li> <li>Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.</li> </ul>	and g	go to line 15,
Part li Part 5	<ul> <li>Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.</li> <li>Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filling status is married filling separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.</li> <li>Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.</li> <li>Enter the smaller of the loss on line 1d or the loss on line 4</li></ul>	and g	go to line 15,
Part li Part 5	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4	and g	go to line 15,
Part li Part 5	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filling status is married filling separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions	and g	go to line 15,
Part li Part 5	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If Jine 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.  Subtraction 7 from line 6	and of the y	go to line 15. rear, do not complet
Part le Part 5 6 7	Line 2c is a Toss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filling status is married filling separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (.5), Do not enter more than \$25,000. If married filing separately, see instructions	and of the y	go to line 15. rear, do not complet
Part li Part 5 6 7	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions.  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If time 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.  Subtractiline 7 from line 6.  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9.	and of the y	go to line 15. rear, do not complete
Part la Part 5 6 7 8 9 10	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions.  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.  Subtract line 2 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9 If line 2c is a loss, go to Part III. Otherwise, go to line 15.	5 5 9	go to line 15, rear, do not complet
Part 16 5 6 7 8 9	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filling status is married filling separately and you fived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0- on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2c is a loss, go to Part III. Otherwise, go to line 15.	and of the y	go to line 15. rear, do not complet
Part la Part 5 6 7 8 9 10	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000, If married filing separately, see instructions.  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If tine 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2e is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions	5 5 9 10	go to line 15. rear, do not complet
Part la Part 5 6 7 8 9 10 Part	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2c is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions	5 9 10	go to line 15, rear, do not complet
Part 16 5 6 7 7 8 9 10 Part 11 12	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If Jine 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtractione 7 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2c is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions Enter the loss from line 4.	5 9 10	go to line 15, rear, do not complet
Part 16 5 6 7 7 8 9 10 Part 11 12 13	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 If married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0-or line 10. Otherwise, go to line 8.  Subtractine 7 from line 6  Multiply line 8 by 50% (5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2c is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions Enter the loss from line 4.  Reduce line 12 by the amount on line 10.	5 9 10 Acti	go to line 15. rear, do not complet
Part la 5 6 7 7 8 9 10 Part 11 12 13 14	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3dds a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during for Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 if married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If time 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 or line 10. Otherwise, go to line 8.  Subtract line 7 from line 6.  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2c is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions Enter the loss from line 4.  Reduce line 12 by the amount on line 10.  Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13.	5 9 10	go to line 15. rear, do not complet
Part la 5 6 7 7 8 9 10 Part 11 12 13 14 Part	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 if married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2e is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions Enter the loss from line 4.  Reduce line 12 by the amount on line 10.  Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13.	5 9 10 11 12 13	yo to line 15.
Part la Part la 5 6 7 8 9 10 Part 11 12 13 14 Part 15	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000. If married filing separately, see instructions.  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 ffrom line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2e is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10, If married filing separately, see instructions Enter the loss from line 4.  Reduce line 12 by the amount on line 10.  Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13.  Total Losses Allowed  Add the income, if any, on lines 1a and 3a and enter the total.	5 9 10 Acti	yo to line 15.
Part la 5 6 7 7 8 9 10 Part 1 1 1 2 1 3 1 4 Part 1 1 1 1 2 1 3 1 4 Part 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.  Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III on: If your filing status is married filing separately and you lived with your spouse at any time during or Part III. Instead, go to line 15.  Special Allowance for Rental Real Estate Activities With Active Participation Note: Enter all numbers in Part II as positive amounts. See instructions for an example.  Enter the smaller of the loss on line 1d or the loss on line 4.  Enter \$150,000 if married filing separately, see instructions  Enter modified adjusted gross income, but not less than zero (see instructions)  Note: If line 7 is greater than or equal to line 6, skip lines 8 and 9, enter -0 on line 10. Otherwise, go to line 8.  Subtract line 7 from line 6  Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see instructions Enter the smaller of line 5 or line 9  If line 2e is a loss, go to Part III. Otherwise, go to line 15.  Special Allowance for Commercial Revitalization Deductions From Rental Real Estate Note: Enter all numbers in Part III as positive amounts. See the example for Part II in the instructions Enter \$25,000 reduced by the amount, if any, on line 10. If married filing separately, see instructions Enter the loss from line 4.  Reduce line 12 by the amount on line 10.  Enter the smallest of line 2c (treated as a positive amount), line 11, or line 13.	5 9 10 11 12 13	go to line 15. rear, do not complete

	Curre	nt year		Prior ye	ars	Over	ralı ga	in or loss
Name of activity	(a) Net income (b) Net loss (line 1a) (line 1b)			(c) Unallowed loss (line 1c)		(d) Gain		(e) Loss
								4.
		ļ				-Killi Market Street String	539687081	SORIO ENTRESE DON
otal. Enter on Form 8582, lines a, 1b, and 1c								
orksheet 2 - For Form 8582,	Lines 2a and 2b (	See instru	ictions.)			AP.	. To	1
Name of activity	(a) Curre deductions			(b) Pri nallowed ded	or year	and a second	(c)	Overall loss
	deddottone	(IIII E Za)		iajjowea dea	dottoni	A	div.	
			191212 1	42	A			
					1914	THE STATE OF THE PARTY NAMED IN COLUMN TWO IS NOT THE PARTY NAMED IN COLUMN TO THE PARTY NAMED IN COLUM		
otal. Enter on Form 8582, lines				1	<b>P</b>	SPEC		GROUPS SAN PROBLEMS SEED
a and 2b				A.	A P	4 200		
Vorksheet 3 - For Form 8582,	Lines 3a, 3b, and	3c (See in	nstruction	1S.) ## "		γ.		
	Curre	nt year		Priorye	ars	Ove	rall ga	in or loss
Name of activity	(a) Net income	(b) Ne	t loss_	(c) Unallo	wed			
	(line 3a)	(line	~00000000	loss (line		(d) Gain		(e) Loss
SEE STATEMENT 36		JARCE!	rile position in	155 155				
		4	statificati	9 <sup>pr</sup>				
*		- Water	Ž.					
	A. A.	A 40	SESP <sup>**</sup>			ást agérsthannhaisteach fe	CHARLE VON	-Stock were as a second
otal. Enter on Form 8582, lines a, 3b, and 3c	2,626,818.		, 211.			#1 <b>55</b> 0%	de de la compa	
Vorksheet 4 - Use this worksh	neet if an amount	is shown	on For	n 8582, line	10 or	14 (See instri	uction	18.)
	Form or schedule	900 200 200 200 200 200 200 200 200 200						(d) Subtract
Name of activity	and line number to be reported on	(a) L	.055	(b) Ratio	o (c) Special allowance			column (c) fro
<u>2040</u>	(See instructions)							column (a)
	ir Ir							
		)					- 1	
				<u>-</u>				
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otal		ee instru	ctions )	1.00				100000
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Name of activity	and line n	umber	(a)	Loss		(b) Ratio		c) Unallowed los
	to be repor		(-/			(-,		,
HE W. MITT ROMNEY B	BLI SCH E,	33		1,211.	1	. 0000000	-	
THE RESERVE OF THE PARTY OF THE			.59				1	
				9				
							-	
	1	1						

Worksheet 6 - Allowed Losse	s (See instruction	s.)			
Name of activity	•	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
THE W. MITT ROMNEY	BLIND .	SCH E, 33	1,211.		1,211.
			-		
	7	7			
Total			1,211.		1, 211.
Worksheet 7 - Activities With	h Losses Reporte	d on Two or More	Forms or Schedule	es (See instructions	.) ASSESSMENT OF THE PARTY OF T
Name of activity:	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
Form or schedule and line number to be reported on (see instructions):					
1 a Net loss plus prior year unallowed					
less from form or schedule >					
b Net income from form or			- 1		
schedule ▶ L			<b>E</b> 4	<i>ap</i> _	-
c Subtract line 1b from line 1a. If ze	ero or less, enter -0-	•			
Form or schedule and line number to be reported on (see instructions):					
1 a Net loss plus prior year unallowed					
loss from form or schedule		_			
b Net income from form or					
schedule		14 14 14 14 14 14 14 14 14 14 14 14 14 1	<u> </u>		
c Subtract line 1b from line 1a. If ze	ero or less, enter -0-	- 100	9		
Form or schedule and line number to be reported on (see instructions):	- K. 3002 ( 30000 30000				
1a Net loss plus prior year unallowed	AND SOUTH	Eig .			
loss from form or schedule	AF The				
b Net income from form or					
schedule L	A Trans				
c Subtract line 1b from line 1a, df-ze	eroor less, enter -0-	•			
Total			4.00		
Total			1.00		Form 8582 (2011)

#### Form 8582-CR

#### Passive Activity Credit Limitations

See separate instructions.

► Attach to Form 1040 or 1041.

OMB No. 1545-1034

Attachment Sequence No. 89

Identifying number

(Rev. December 2010) Department of the Treasury Internal Revenue Service

Name(s) shown on return

WILLARD M ROMNEY & ANN D ROMNEY

Part Passive Activity Credits Caution: If you have credits from a publicly traded partnership, see Publicly Traded Partnerships (PTPs) on page 14 of the instructions. Credits From Rental Real Estate Activities With Active Participation (Other Than Rehabilitation Credits and Low-Income Housing Credits) (See Lines 1a through 1c on page 9.) b Prior year unallowed credits from Worksheet 1, column (b) . . . . . . . . 1b c Add lines 1a and 1b Property Placed in Service Before 1990 (or From Pass-Through Interests Acquired Before 1990) (See Lines 2a through 2c on page 9.) b Prior year unallowed credits from Worksheet 2, column (b) . . . . . . . . . Low-Income Housing Credits for Property Placed in Service After 1989 (See Lines 3a through 3c on page 9.) 3a All Other Passive Activity Credits (See Lines 4a through 4compage 10.) 4a b Prior year unallowed credits from Worksheet 4, column (b) 4b 100. 100. 5 Enter the tax attributable to net passive income (see page 10). . . . . . . . . . . . SEE, STMT. 37. 6 918,962. 7 Subtract line 6 from line 5. If line 6 is more than or equal to line 5, enter -0- and see page 10 . . . . . . Note: If your filing status is married filing separately and you lived with your spouse at any time during the year, do not complete Part II, III, or IV. Instead, go to line 37. Part II Special Allowance for Rental Real Estate Activities With Active Participation Note: Complete this part only if you have an amount on line 1c. Otherwise, go to Part III. 8 Enter the smaller of line 1c or line 7.......... Enter \$150,000. If matried fling separately, see page 10 . . . . . . . . . Enter modified adjusted gross income, but not less than zero (see page 10). If line 16 is equal to or more than line 9, skip lines 11 through 11 Multiply line 11 by 50% (.50). Do not enter more than \$25,000. If married fiting separately, see page 10.......... 13a Enter the amount, if any, from line 10 of Form 8582 . . . . . . . . . . . b Enter the amount, if any, from line 14 of 13b 13c 14 Subtract line 13c from line 12....... 15 Enter the tax attributable to the amount on line 14 (see page 10) . . . 16 For Paperwork Reduction Act Notice, see page 15 of the instructions. Form 8582-CR (Rev. 12-2010)

1X5520 1.000

	8582-CR (Rev. 12-2010) WILLARD M ROMNEY & ANN D ROMNEY		Page 2
Pa	Special Allowance for Rehabilitation Credits From Rental Real Estate Activities and Credits for Property Placed in Service Before 1990 (or From Pass-Through Interests Note: Complete this part only if you have an amount on line 2c. Otherwise, go to Part IV.		
17	Enter the amount from line 7	17	
18		18	
19	Enter the amount from line 16  Subtract line 18 from line 17. If zero, enter -0- here and on lines 30 and 36, and then go to	10	
13	Part V	19	
20	Enter the smaller of line 2c or line 19	20	
21	Enter \$250,000. If married filing separately, see page 13. (See page 13	20	
- 1	to find out if you can skip lines 21 through 26.)		
22	Enter modified adjusted gross income, but not less than zero. (See		Sign.
	instructions for line 10 on page 10.) If line 22 is equal to or more than		Blance Wille
	line 21, skip lines 23 through 29 and enter -0- on line 30		A CONCERN
23	Subtract line 22 from line 21		- TOP-
24	Multiply line 23 by 50% (.50). Do not enter more than \$25,000. If married		
	filing separately, see page 13		
25a	Enter the amount, if any, from line 10 of		
	Form 8582 25a		
b	Enter the amount, if any, from line 14 of		
	Form 8582 25b		
С	Add lines 25a and 25b		
26	Subtract line 25c from line 24		
27	Enter the tax attributable to the amount on line 26 (see page 13)		
28	Enter the amount, if any, from line 18		
29	Subtract line 28 from line 27	29	
30	Enter the smaller of line 20 or line 29	30	
Pa	TIV Special Allowance for Low-Income Housing Credits for Property Placed in Service A		1989
	Note: Complete this part only if you have an amount on line 3c. Otherwise, go to Part V.		100 000 000 000 000 000 000 000 000 000
31	If you completed Part III, enter the amount from line 19. Otherwise, subtract line 16 from line 7	31	3031/1000/49/03
32	Enter the amount from line 30 Subtract line 32 from line 31. If zero, enter -0- here and on line 36	32	
33	Subtract line 32 from line 31. If zero, enter -0- here and on line 36	33	
34	Enter the smaller of line 3c or line 33	34	100
35	Tax attributable to the remaining special allowance (see page 13)	35	
36	Enter the smaller of line 34 or line 35	36	
Pa	tV Passive Activity Credit Allowed	(i) (ii)	
37	Passive Activity Credit Allowed. Add lines 6, 16, 30, and 36. See page 13 to find out how to		
	report the allowed credit on your tax return and how to allocate allowed and unallowed credits		
	if you have more than one credit or credits from more than one activity. If you have any credits		
	from a publicly traded partnership, see Publicly Traded Partnerships (PTPs) on page 14	37	100.
Pa	rt VI Election To Increase Basis of Credit Property		100.
38	If you disposed of your entire interest in a passive activity or former passive activity in a fully taxable	trans	saction and you
-	elect to increase your basis in credit property used in that activity by the unallowed credit that reduce		-
	property, check this box. See page 15		
39	Name of naccive activity disposed of		
40	Description of the credit property for which the election is being made		
41	Amount of unallowed credit that reduced your basis in the property	\$	

Form 8582-CR (Rev. 12-2010)

THE TAXPAYERS EXPECT TO HAVE A FORM 8865 FILING REQUIREMENT IN 2011; HOWEVER INFORMATION IS NOT CURRENTLY AVAILABLE OR ESTIMABLE AT THIS TIME.

### Return of U.S. Persons With Respect to Certain Foreign Partnerships Attach to your tax return. See separate instructions.

OMB No. 1545-1668

Department of the Treasury Internal Revenue Service

Information furnished for the foreign partnership's tax year , and ending

Attachment Sequence No. 118

Name of perso	on filing this return			FII	ers identifyir	ng number			
Filer's address	s (if you are not filing this form with you	ır tax retum)	A Category of file	er (see Cate	gories of Filer		uctions and ofted	k applicable box	(es)):
			B Filer's tax year	r beginning			, and ending		7550X V0079580 N1
BELMONT,	MA 02478		D Files S tax year	торыншу.			, and ending.	wit.	
	nare of liabilities: Nonrecourse \$		Qualified non	recourse fi	nancing \$		Other \$	150	
D If filer is	a member of a consolidated group	up but not the p	parent, enter the	following in	formation ab	out the parer	rt:	45 German	in a second
Name				EIN			4	State	MEU:
Address									
E Informat	on about certain other partners (	see instructions	)				A. A. A.	1	
	1) Name	12	) Address		(3) Identifyi	na numbec	52. 553	eck applicable b	Constructive
	1) Ivanio		, , , , , , , , , , , , , , , , , , , ,	-	(0) 100		Category	Category 2	owner
				*********	<u> </u>	Fb.	of Hariothy.		-
			-			<b>*</b>	1		
					185	<u></u>	V		
F1 Name ar	nd address of foreign partnership				THE PERSON NAMED IN COLUMN TWO IS NOT THE PERSON NAMED IN COLUMN TWO IS NAM	# A	2(a) EIN (if a	ny)	
PRIOR Y	EAR FILING REQUIREME	NT		쾏			2(b) Referen	ce ID number	(see instr.)
				**************************************	A. A. C.		3 Country un	der whose la	ws organized
4 Date of	5 Principal place of	6 Principal	business		business	8a Functi	onal currency	8b Exchan	
organiza		activity o	ode number	activity	7			(see ins	str.)
			1	ick.					
G Provide	the following information for the	foreign partners	shipis tax year:	120					
	ddress, and identifying number o		70.00	2 Check i	f the foreign	partnership	must file:		
United S		- Ost			rm 1042		n 8804	Form 108	65 or 1065-B
				(			5 or 1065-B is		
	nd address of foreign partnership tion, if any	's agent to coun	treof	records	nd address of of the foreig ords, if differ	n partnersh	with custody of ip, and the loc	of the books ar ation of such I	nd books
		35p							
								T	1 1
	y special allocations made by the							Yes	No
	e number of Forms 8858, Inform			-		_			
	to this return (see instructions)						>		
	his parthership classified under t					<b></b>			
	partnership own any separate un 1)-1(b)(4)?		neaming of Regula					Yes	No
	s parthership meet both of the fo	llowing requirer	nents?						
<ul><li>The</li></ul>	partnership's total receipts for the value of the partnership's total a do not complete Schedules L, M	ssets at the en	eless than \$250,0 d of the tax year w	oo and as less tha	n \$1 million.	}		Yes	L No
Sign Bere Only If You Are Filing This Form Separately	Under penalties of perjury, it declar and belief, it is true, correct, and c information of which preparer has a	omplete. Declara	mined this return, ind tion of preparer (oth	cluding acco er than gene	mpanying sche eral partner or li	dutes and stat imited liability o	tements, and to to company member	the best of my kr er) is based on a	nowledge II
and Not With Your Tax	Signature of general partner of	limited liability con	npany member			Date			
Return.	Print/Type preparer's name		Preparer's signature			Date	Check	if PTIN	
Paid							self-em		
Preparer	Firm's name ▶ PRICEWA	PERHOUSE	COOPERS	T.T.P			Firm's E		50
Use Only		H STREET		A. J. J. J.			Phone		
	BOSTON,	MA 0211					Thone !	14.	
JSA	Paperwork Reduction Act Notic							Form	8865 (2011
1X1910 2.000		, copul							,

Form	8865	(201)	1)
------	------	-------	----

S	hedu	box b, enter the interest you cons	mership of Partnership Interest. Ch name, address, and U.S. taxpayer in tructively own. See instructions.	neck dent	the boxes the tifying number of the constant o			e filer. If he person	you check (s) whose
-		Name	Address		Identifying nu			Check if foreign	Check if direct
_		Name .	Address	$\perp$	ruentitying nu	inder (ir arr)	"	person	partner
-				+			-		
				+-					
				+					
-				_		-		1,850	
S	hedu	le A-1 Certain Partners	of Foreign Partnership (see instructi	ons	3			- COL	
_	411.4.1.							On the second	Check if
		Name	_ Address		Identifyir	ng number	(if any)	De AN - WHOLE	foreign person
							100	The E	
								SPERIOD .	1 1, 10, 10, 10
						417	- 4E		
_						4	£.	₩	
_			<u> </u>		litte.	A 100	#		Ļ.,
_			reign person as a direct partner?		\$160		7	Yes	No_
S	neau		ule. List all partnerships (foreign or d	lome	estic) in whic	hithe for	reign	partnersh	ip owns a
		directifiterest of i	ndirectly owns a 10% interest.		A A TON	Ah.	T	t-ti	Check if
		Name	Address	.40	EIN (if any			tal ordinary ome or loss	foreign partnership
				4		-			parateranip
_			₹[	Na.	planting op				
				100	t.				
	0.00		A Partie		6	30,30.5			
			Constant of	5					
Sc	hedu	e B Income Statemer	nt - Trade or Business Income			22.03			
Ca	ution.	Include only trade or business	income and expenses on lines to throu	gh 2:	2 below. See t	he instruc	tions	for more inf	ormation.
Income	1 a b 2 3 4 5 6 7	Cost of goods sold	rom line 16 other partnerships estates, and trusts (att. Schedule F (Form 1040)) 97, Part II line 17 (attach Form 4797) (atement)	ach s	statement)	1 c 2 3 4 5 6 7 8			
	9	Salaries and wages onther th	an to partners) (less employment credits)			9		314,375,485	
~	10	Guaranteed payments to part	ners			10	10000000V		
[mitabons]	11					11			
fmit	12					12			
is for	13					13			-
(see instructions	14					14			
netro	15	700				10			
9.0			sch Form 4562) 16a			16c			
	17		Isewhere on return			17			
ductions	18		and gas depletion.)			18			
rct	19					19			
- do	20		ement)	• • •		20			9/
۵		Carer deductions juttacin stat	Seriodist	• • •					10000
_	21_	Total deductions. Add the am	ounts shown in the far right column for lines 9	9 thro	ugh 20 ,	21			
	22	Ordinary business income (loss)	from trade or business activities. Subtract line	e 21 f	rom line 8	22			
JSA		,						Form 8	865 (2011)
or half to									

Form 8865 (2011) PRIOR YEAR FILING REQUIREMENT Page :
Schedule D Capital Gains and Losses (Use Schedule D-1 (Form 1065) to list additional transactions for lines 1 and 7)

	(a) Description of property	(b) Date acquired	(c) Date sold	(d) Sales price	(e) Cost or other basis	
	(Example: 100 shares of "Z" Co.)	(month, day, year)	(month, day, year)	(see instructions)	(see instructions)	Subtract (e) from (d)
1						
						No. Oak
						Q <sub>b</sub> ,
2	Enter short-term gain or (loss), if any, from S	Schodula D-1 /For	m 1065) line 2		2	
-	Enter short-term gain or (loss), if any, from a	cheduje b-1 (Foi	III 1003), iiile 2 ,	÷.		
3	Short-term capital gain from installment sale	s from Form 625	2, line 26 or 37,		3	
4	Short-term capital gain (loss) from like-kind ex	changes from Fo	orm 8824		чения 4	
		To	10.1.01	All the second	÷	
5	Partnership's share of net short-term ca capital gains (losses), from other partnerships	pital gain (loss estates and tru	), including sp sts	ecially allocated	short-term 5	
			400	Alexander To		
6	Net short-term capital gain or (loss). Cor Form 8865, Schedule K, line 8 or 11		4000			
Da			233-4	N V	6	
Fal	Long-Term Capital Gains and Loss (a) Description of property		Control Sec		1	
	(Example: 100 shares of "Z" Co.)	(b) Date acquired (month, day, year)	(c) Date sold (month, day, year)	(d) Sales price (see instructions)	(e) Cost or other basis (see instructions)	(f) Gain or (loss) Subtract (e) from (d
			4			
7			12"			
JESPESE	ge st					
		\$50 100 100 100 100 100 100 100 100 100 1				
	dupas had an	38500				
					,	
8	Enter long-term gain or noss) if any, from Se	chedule D-1 (Forr	n 1065), line 8		8	
	Long-term capital gain from installment sales	from Form 625	2, line 26 or 37		9	
9	The state of the s				40	
	Long term capital gain (loss) from like kind a	vehanges from E	orm 9924			
	Long-term capital gain (loss) from like-kind e	xchanges from F	orm 8824		10	
10	Partnership's share of net long-term capital	l gain (loss), in	cluding specially	allocated long-t	erm capital	
10	All and adding	l gain (loss), in	cluding specially	allocated long-t	erm capital	
10	Partnership's share of net long-term capital	d gain (loss), in s, and trusts	cluding specially	allocated long-t	erm capital	
10	Partnership's share of net long-term capital gains (losses), from other partnerships, estate Capital gain distributions	al gain (loss), inc s, and trusts	cluding specially	allocated long-t	erm capital 11	
9 10 11 12	Partnership's share of net long-term capital gains (losses), from other partnerships, estate	al gain (loss), inc s, and trusts	cluding specially	allocated long-t	erm capital 11	

ring.	-	_	_	1
- 5-4	24	a	м	

Form 886	5 (2011)	PRIOR YEAR FILING REQUIREMENT		Page 4
Sched	ule K	Partners' Distributive Share Items		Total amount
	1	Ordinary business income (loss) (page 2, line 22)	1	5 5,05,03,03,0
1	2	Net rental real estate income (loss) (attach Form 8825)		
	3 a	Other gross rental income (loss)3a		
		Expenses from other rental activities (attach statement) 3b	Jan.	
	b		3 c	
	c	Other net rental income (loss). Subtract line 3b from line 3a		
ô	4	Guaranteed payments		
8	5	Interest income		
=	6	Dividends: a Ordinary dividends	6a	zh. Frisp
ncome (Loss)		b Qualified dividends 6b	121313	
ĕ	7	Royalties	7	TERMINA SA
-	8	Net short-term capital gain (loss)	8	
	9 a	Net long-term capital gain (loss)	9 a	3 4
	b	Collectibles (28%) gain (loss)	3550038	distriction of
	C	Unrecaptured section 1250 gain (attach statement) 9c	506H S	The state of the s
	10	Net section 1231 gain (loss) (attach Form 4797)	10	- T
	11	Other income (loss) (see instructions) Type ▶	11	100
-		Section 179 deduction (attach Form 4562)	12	
S.				
쓡			13b	
ğ	G.	Investment interest expense (1) Type >	-	
Deductions	c.	Section 59(e)(2) expenditures: (1) Type ▶(2) Amount ▶		
70.8	d	Other deductions (see instructions) Type ▶	13d	
Self- Employ- ment		Net earnings (loss) from self-employment , ,		The state of the s
Sel	b	Gross farming or fishing income	14b	
, P =	С	Gross nonfarm income	14c	
	15 a	Cross nonfarm income	15a	
40	b	Low-income housing credit (other)	15b	
dits	c	Qualified rehabilitation expenditures (rental real estate) (attach Form 3468)	15c	
Credits	d	Other rental real estate credits (see instructions)	15d	
0	e	Other than the fact in the street of the str	15e	
	f	Other credits (see instructions)  Other credits (see instructions)	15f	
N	40-	Name of country of H.S. possession N. Alex		
	16a	Name of country or U.S. possession	16b	
	ь	Gross income from all sources	165	
Transactions	c	Gross income sourced at partner level		
Ę		Foreign gross income sourced at partnership level	32750	
Sa	d	Passive category ► e General category ► f Other (attach statement) ►	16f	
ran		Deductions allocated and apportioned at partner level	33488	
F	g	Interest expense h Other	16h	
<u> </u>		Deductions allocated and apportioned at partnership level to foreign source income	<b>Walls</b>	
Foreign	i	Passive category ▶ j General category ▶ k Other (attach statement) ▶		
u.	- 1		161	
	m	70,697	16m	
8	n	Other foreign tax information (attach statement)	(15)183	
	17 a	Post-1986 depreciation adjustment	17a	Stephology
a a∂		Adjusted gain or loss		
ati E m				12 17
Alternative Minimum Tax (AMT) Items	40	Depletion (other than oil and gas)  Oil, gas, and geothermal properties - gross income  Oil, gas, and geothermal properties - deductions	17d	2/10/2019
¥ E E	100	Oil, gas, and geothermal properties - deductions	17e	-10000000000000000000000000000000000000
Z 2	-			
-	40	Other AMT items (attach statement)		
_	L.	Tax-exempt interest income		
÷		Other tax-exempt income		
E		Nondeductible expenses	18c	
.0		Distributions of cash and marketable securities		
Ξ	b	Distributions of other property	19b	
9	20 a	Investment income	20a	
Other Information	b	Investment expenses	20b	A STATE OF THE PARTY OF THE PAR
_	С	Other items and amounts (attach statement)	02380	
100 galaga				Form 8865 (2011

Page 5

Sch	redule L Balance Sheets pe	er Books, (Not require	d if Item G9, page 1,	is answered "Yes.")	7	
. <u> </u>		Beginning	of tax year	End of tax year		
	Assets	(a)	(b)	(c)	(d)	
1	Cash					
2 a	Trade notes and accounts receivable					
b						
3	Inventories					
4	U.S. government obligations				The state of the s	
5	Tax-exempt securities	CMC15 1. 12 COOK 1. STOLEN TO THE COOK 1. ST			-th	
6	Other current assets (attach statement)			7.47.700000 7.44.0000 0.47.700000 7.44.0000	Table Table	
7a				400000000000000000000000000000000000000	Storen and Aller	
	Mortgage and real estate loans			GS 50506 NG 12 15 15 15	FI CONT.	
8	Other investments (attach statement)				I AF	
9 a	Buildings and other depreciable assets			. 👰 🔏	500 10 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
b	Less accumulated depreciation			# A		
	Depletable assets		and the state of t	4 4		
	Less accumulated depletion			# Th. 28		
11	Land (net of any amortization)	1 20 1 20 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				
12 a	Intangible assets (amortizable only)			The second		
	Less accumulated amortization		4	**		
13	Other assets (attach statement)		Apr.			
14	Total assets	20 3 3 N 1888 342 3 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2	Jan Haller	A TREAT CENTRAL PROPERTY OF THE SAME OF TH		
	Liabilities and Capital	FF FIXER BLOCK HERRISCHE STEEL FEILER		COLON CONSTRUCTION OF STREET		
15	Accounts payable		A Description			
16	Mortgages, notes, bonds payable in less than 1 year	TOTAL SECTION				
17	Other current liabilities (attach statement)	#1#6384575 E-15	27 00-	SARECUSER ACTUAL CONTROL OF THE SERVICE ACTUAL CONTROL OF THE SERV		
18	All nonrecourse loans		Allendar Allendar			
19	Mortgages, notes, bonds payable in 1 year or more	7 3 13 10 10 10 10 10 10 10 10 10 10 10 10 10	the state of the s			
20	Other liabilities (attach statement),		4500			
21	Partners' capital accounts		Jiji	TOS REPORTED TO THE PROPERTY OF THE PROPERTY O		
22	Total liabilities and capital		Party of the second of the sec			
		W. A.	3		Form 8865 (2011	

Form	8865 (2011) PRTOR YEAR FI	TING REQUIREMENT	Г		Page 6
		or Interest Allocation			
_				(a) Beginning of tax year	(b) End of tax year
,	Total U.S. assets				
2	Total foreign assets:				springer reproduction and passed reviews
	Passive category				
	General category				
	Other (attach statement)	f Income (Lose) per Book	e W	ith Income (Loss) per Return.	Not required if Item G9, page
5c	hedule M-1 Reconciliation on 1, is answered "Ye		15 11	rui income (Loss) per Neturi.	(Not required in hairs Go, page
_			6	Income recorded on books this	700
1	Net income (loss) per books			year not included on Schedule K,	COMPANY OF
2	Income included on Schedule K.			lines 1 through 11 (itemize):	The state of the s
7	lines 1, 2, 3c, 5, 6a, 7, 8, 9a, 10.		a	Tax-exempt interest \$	The state of the s
	and 11 not recorded on books				- Chroman
	this year (itemize):		7	Deductions included on Schedule	- W.
3	Guaranteed payments (other			K, lines 1 through 13d, and 161 not	\$ TO
-	than health insurance)			charged against book igcome this	1 181
4	Expenses recorded on books			year (itemize):	
	this year not included on		a	Depreciation \$	
	Schedule K, lines 1 through				İ
	13d, and 16I (itemize):				
а	Depreciation \$				
	Travel and entertainment \$		8	Add lines 6 and 7	1
-	·		9	Income (loss). Subtract line 8	
5	Add lines 1 through 4,			from line 5	(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)
Sc	hedule M-2 Analysis of Partn	ers' Capital Accounts. (N	ot re	quired if Item G9, page 1, is ans	swered "Yes.")
1	Balance at beginning of year		Tine	Distributions: a Cash	
2	Capital contributed:			b Property	
	a Cash	## ## \$2, _cdf	F7	Other decreases (itemize):	
	b Property		. ST		
3	Net income (loss) per books		2000		
4	Other increases (itemize):				
		ASPAN ASPAN	8	Add lines 6 and 7	
		· ·	9	Balance at end of year. Subtract	
5	Add lines 1 through 4	AND THE PERSON AND TH		line 8 from line 5	
		The same			Form 8865 (2011

Transactions Between Controlled Foreign Partnership and Partners or Other Related Entities Schedule N

Important: Complete a separate Form 8865 and Schedule N for each controlled foreign partnership. Enter the totals for each type of transaction that occurred between the foreign partnership and the persons listed in columns (a) through (d).

	Transactions of foreign partnership	(a) U.S. person filing this return	(b) Any domestic corporation or partnership controlling or controlled by the U.S. person filing this return	(c) Any other foreign corporation or partnership controlling or controlled by the U.S. person filing this return	(d) Any U.S. person with a 10% or more direct interest in the controlled foreign partnership (other than the U.S. person filing this return)
1	Sales of inventory	- MAAAAAATTOTO: .			
2	Sales of property rights (patents, trademarks, etc.)	5555 95555 15	15 45 100,000 S		4.
3					
4	Commissions received			45	
5	Rents, royalties, and license fees received				(British)
6	Distributions received			4 4	<b>*</b>
7	Interest received				
8	Other				
9	Add lines 1 through 8		4		
10	Purchases of inventory		1		
11	Purchases of tangible property other than inventory			- American	
12	Purchases of property rights (patents, trademarks, etc.)				
13	Compensation paid for technical, managerial, engineering, construction, or like services				
14	Commissions paid	# An	STATE OF THE PARTY		
15	Rents, royalties, and license fees paid . ,		<i>®</i>		
16	Distributions paid	展 概			
17	Interest paid				
18	Other,				
19	Add lines 10 through 18	E-20-			
	Amounts borrowed (enter the maximum loan balance during the year). See	THE COLUMN TWO IS NOT			
21	instructions Amounts loaned (enter the maximum loan balance during the year). See instructions.				
	W AND STATES				Form 8865 (2011)

(Rev. December 2011)

#### Information Return of U.S. Persons With Respect To Certain Foreign Corporations

► See separate instructions.

Department of the Treasury Infor Internal Revenue Service section

Information furnished for the foreign corporation's annual accounting period (tax year required by section 898) (see instructions) beginning and ending

OMB No. 1545-0704

Altachment		
Sequence No.	1	21

Internal revenue Service	section 696) (see instructions)	beginning		, a	na enaing		Sequesice	1NO. 121
Name of person filing this return	n					A Ident	tifying number	
WILLARD M ROMN	NEY & ANN D ROMN	ΙΕΥ						
***************************************	uite no. (or P.O. box number if mail is		dress)	B Categ	ory of filer (Se	e instruction	s, Check applicable box	x(es)):
			,			aled) 2	3 4 🗴	i -
City or town, state, and ZiP code								
						_	e foreign corporation's	4
BELMONT, MA 02478				you ov	vned at the e	nd of its annu	uat accounting period	100.00 %
	.,,	dending $12/31/$	/2011				A STATE OF THE STA	
D Person(s) on whose behal	If this information return is filed;						Alibera - Ville	D. Company
(4) Name		(9) Address			(2) Identifi	inn number	(4) Check applica	able box(es)
(1) Name		(2) Address			(2) inclinit	ing number	Shareholder Officer	Director
20 1			200			- 4	F The second	
				-		THE THE	- Table	
						- T	# W	
					, cit	With the same of t	28	
Important: Fill in all a	applicable lines and sche	dules. All informat	ion mus	t be in	Fnalish /	All amon	ofs must be star	ted in
	rs unless otherwise indica							
1a Name and address of for		nou.		-4	AOP (EED	bet Emp	loyer identification num	nber, if any
				Æ.	19			,
	ELD ASSET INVESTORS			Share and the	A A	N/A	rence ID number (see	instructions)
	RNATIONAL LTD., 31	CHURCH ST	45	A STATE OF THE PARTY OF THE PAR		ME) India	rence to number face	a residual or isy
HAMILTON, BERMU	DA HM		Œ	. Commen	TOTO TOTO		-tdbt	
						c Cour	ntry under whose laws	incorporated
				480	***	BERM	Maria	
d Date of incorporation	e Principal place of business	f Principal busines code namb		g Prin	cipal busine	ss activity	h Functional curre	ency
10/09/1997	BERMUDA	5511	TAIL THE TAI	INVE	STMENT	HOLD	USD	
		2012	Amount 65°					
	formation for the foreign corpo							
a Name, address, and ide	entifying number of branch office	e oragent (if any)	If a U.S.	income	tax return w	as filed, ent	ter:	
in the United States		A STATE OF THE STA					(ii) U.S. income ta	x paid
			(I) Tax	able inco	me or (loss)		(after all cred	its)
	- E							
	<u>થ</u>	\$ P						
	4	.00						
c Name and address of fo	reign corporation's statutory or	resident agent in d	Name ar	nd addre	ss (includin	g corporate	e department, if appl	licable) of
country of incorporation			person (	or perso	ns) with cus	stady of the	e books and records	of the foreign
			corporat	ion, and	the location	of such b	ooks and records, if	different
	A SOLUTION OF THE PARTY OF THE							
	THE SHEET STATE OF THE STATE OF							
	AND THE							
	N AV	W					204	
Schedule A Stock	of the Foreign Corporati	on					7	
de	The state of the s			(b) N	umber of sh	ares issued	d and outstanding	70-
(a) Descri	ption of each class of stock		(i) Be	ginning	of annual		(ii) End of annu	
TENNESSER VIII.			ac	counting	period	8.	accounting per	riod
CCHIACH CALL					12,0	90.		
A WA								
THE THE PERSON NAMED IN COLUMN TWO IS NOT THE PERSON NAMED IN COLUMN TO THE PERSON NAMED IN COLU	£2		9					
						1		
For Paparuork Badustian	Act Notice and instructions						E E 474 /5	AD 00141
For Faperwork Reduction	Act Notice, see instructions.						Form 5471 (R	(ev. 12-2011)

Schedule B U.S. Shareholder	s of Foreign Corporation (see instructions) (b) Description of each class of stock held by	(c) Number of	(d) Number of	(e) Pro rata share
(a) Name, address, and identifying number of shareholder	shareholder. Note: This description should match the corresponding description entered in Schedule A. column (a).	shares held at beginning of annual accounting period	shares held at	of subpart F income (enter as a percentage)
WILLARD & ANN ROMNEY	COHINON	12,000.		- parentage,
DET MONTE INT. BUILDING				
BELMONT, MA 02476				1.90
		<u> </u>		-
			4	
			- Attendant	AN A
			The state of the s	1
		dh.		
			7	
			GSP*	-
	450 400 400 400 400		:	1
		1		+

Schedule C Income Statement (see instructions)

Important: Report all information in functional currency in accordance with U.S. GAAP. Also, report each amount in U.S. dollars translated from functional currency (using GAAP translation rules). However, if the functional currency is the U.S. dollar, complete only the U.S. Dollars column. See instructions for special rules for DASTM corporations.

	4500 St. Aug.		Functional Currency	U.S. Dollars
1 a	Gross receipts or sales	1a		
b	Returns and allowances	1 b		<u></u>
c	Subtract line 1b from line 1a	1c		5695
2	Cost of goods sold	2	25.0191_89	
3	Gross profit (subtract line 2 from line 1c)	3	100	
4	Dividends	4		
5	Interest	5	Maria and	
6 a	Gross rents	6a		
b	Gross royalties and license fees	dib		
7	Net gain or (loss) on sale of capital assets	7		
8	Other income (attach schedule) SEE, STATEMENT, 38	8		33335333
9	Total income (add lines 3 through 8)	9		Proc 1915000 (8)
10	Compensation not deducted elsewhere	10		
11a	Rents	11a	11700 1000 1000 1000 1000 1000	68. 80
b	Royalties and license fees	11b	1827712877478747	379
12	Interest	12		
13	Depreciation not deducted elsewhere	13	902202 67 17 8772	
14 19	1900g	14		
15	Taxes (exclude provision for income, war profits, and excess profits taxes)	15	N. C.	
16	Other deductions (attach schedule - exclude provision for income, war			
3/46	profits, and excess profits taxes) SEE, STATEMENT, 38	16		
17	Total deductions (add lines 10 through 16)	17		
18	Net income or (loss) before extraordinary items, prior period			
	adjustments, and the provision for income, war profits, and excess	19000		
	profits taxes (subtract line 17 from line 9)	18	92.039300003 1021000	
19	Extraordinary items and prior period adjustments (see instructions)	19		13 1020200000000000000000000000000000000
20	Provision for income, war profits, and excess profits taxes (see instructions)	20		
	i i a transfer and i transfer al annual annual annual beautiful and a second annual an	21		

Sch	nedule E Income, War Profits, and Excess Profit	s Taxes Paid or Acc	crue		
	(a)			Amount of tax	
	Name of country or U.S. possession	(b) In foreign currency		(c) Conversion rate	(d) In U.S. dollars
1	U.S.				
2		<u> </u>			
3					
4					2000
5				09000 0900	
6					
7					The Wh
_	Total			450	The state of the s
	nedule F Balance Sheet				ATT TO THE TOTAL PROPERTY OF THE PARTY OF TH
_	ortant: Report all amounts in U.S. dollars prepared a an exception for DASTM corporations.	and translated in acc	corda	ance with U.S. GAAP So	e instructions
	Aşşets	49400 19	. 15000	(a) Beginging of annual accounting period	(b) End of annual accounting period
1	Cash		1	A 40.	
2 a	Trade notes and accounts receivable		2a	# A 10	
b			2b		)(
3	Inventories		43=		
4	Other current assets (attach schedule)	.123	4	And Andrews	
5	Loans to shareholders and other related persons		- 5	AND THE PERSON NAMED IN COLUMN TWO IS NOT THE PERSON NAMED IN COLUMN TWO IS NAMED I	
6	Investment in subsidiaries (attach schedule) ,		6		
7	Other investments (attach schedule) SEE, STA	rement 39	7	10,432.	
8 a	Buildings and other depreciable assets . ,		8a		3.4
b			8 b	(	)(
9 a			9a		
b	Less accumulated depletion		9 b	(	¥C
10	Land (net of any amortization)	- Massar	10		
11	Intangible assets:	AF.			
а	Goodwill		11a		
b	Organization costs				
c	Patents, trademarks, and other intangible assets		11c	(	1/
42	Less accumulated amortization for lines 11a, b, and c		12	`	1
12	Other assets (attach schedule)		14		
13	Total assets		13	10,432.	
	produced play		ST NOW THE	2520 G00 (000 (000 ) Produces are an entitle 9 - 00 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
	Liabilities and Shareholders' Equi	ty		GROOMSE PROVIDE TRANSFERSE	
14	Accounts payable		14		
15	Other current liabilities (attach schedule)				
16	Loans from shareholders and other related persons			3,939	
17	Other liabilities-(altach schedule)		17		1
18	Capital stock				
a	Preferred stock		18a		1
b				12,000.	
19	Paid-in or capital surplus (attach reconciliation)				
20	Retained earnings			,	1/
21	Less cost of treasury stock		21	<u> </u>	11
	Wash Sahistina and abandulah at an day			10 420	
22	Total liabilities and shareholders' equity , ,		122	10,432.	Form 5471 (Rev. 12-2011

Forn	1 5471 (Rev. 12-2011)	Page 4			
Sc	hedule G Other Information				
1	During the tax year, did the foreign corporation own at least a 10% interest, directly or indirectly, in any foreign	No			
	partnership?	X			
	If "Yes," see the instructions for required attachment.				
2	During the tax year, did the foreign corporation own an interest in any trust?	X			
3	During the tax year, did the foreign corporation own any foreign entities that were disregarded as entities separate	-			
	from their owners under Regulations sections 301.7701-2 and 301.7701-3 (see instructions)?	X			
	If "Yes," you are generally required to attach Form 8858 for each entity (see instructions).				
	During the tax year, was the foreign corporation a participant in any cost sharing arrangement?	Y			
4	During the course of the tax year, did the foreign corporation become a participant in any cost sharing arrangement?	X			
Þ	During the course of the fax year, did the foleign corporation become a participant in any cost snaming arrangements	(A)			
94	hedule H Current Earnings and Profits (see instructions)				
	cortant: Enter the amounts on lines 1 through 5c in functional currency.				
	700° 1101 100b				
1	Current year net income or (loss) per foreign books of account				
2	Net adjustments made to line 1 to determine current earnings and profits  Net Net				
	43				
	according to U.S. financial and tax Additions Subtractions				
	accounting standards (see instructions):				
а	Capital gains or losses				
b	Depreciation and amortization				
	Depletion				
	Investment or incentive allowance				
	10° IN NEWS				
	Charges to statutory reserves				
	Inventory adjustments , , , ,				
9	Taxes				
h	Other (attach schedule)				
3	Total net additions , ,				
4	Total net subtractions				
5 a	Current earnings and profits (line 1 plus line 3 minus line 4)				
	DASTM gain or (loss) for foreign corporations that use DASTM (see instructions)				
	Combine lines 5a and 5b				
	Current earnings and profits in U.S. dollars (line 5c translated at the appropriate exchange rate as				
	defined in section 989(b) and the related regulations (see instructions))				
	Enter exchange rate used for line 5d ▶				
Sc	hedule   Summary of Shareholder's Income From Foreign Corporation (see instructions)				
4	Subpart F income (line 38b, Worksheet A in the instructions)				
•	Support income (sine 555, voice to the support of t				
_	The state of the s				
2	Earnings invested in U.S. property (line 17, Worksheet B in the instructions)	<del></del>			
3	Previously excluded subpart Frincome withdrawn from qualified investments (line 6b, Worksheet C in	NONE			
	the instructions) 3	NONE			
4	Previously excluded export trade income withdrawn from investment in export trade assets (line 7b,				
	Worksheet D in the instructions)				
5	Factoring income 5				
6	Total of lines 1 through 5. Enter here and on your income tax return. See instructions6	NONE			
-					
7	Dividends received (translated at spot rate on payment date under section 989(b)(1))				
,	Dividends received (translated at spot rate on payment date dider section 500(b)(1))				
	Exchange gain or (loss) on a distribution of previously taxed income				
8		s No			
		S NO			
	Was any income of the foreign corporation blocked?				
	Did any such income become unblocked during the tax year (see section 964(b))?				
If t	he answer to either question is "Yes," attach an explanation.				
	Form 5471 (Rev	. 12-2011)			

(Form 5471) SCHEDULE J

Department of the Treasury Internal Revenue Service (Rev. December 2005)

▶ Attach to Form 5471, See Instructions for Form 5471.

ROMNEY

ANN

WILLARD M ROMNEY

Name of foreign corporation

Name of person filing Form 5471

Accumulated Earnings and Profits (E&P) of Controlled Foreign Corporation

OMB No. 1545-0704

Identifying number

Schedule J (Form 5471) (Rev. 12-2005) (combine columns -1,568 (d) Total Section (a), (b), and (c)) 964(a) E&P (iii) Subpart F Income 13,366. (c) Previously Taxed(E&P (see instructions) (sections 959(c)(1)/and (2)/balances) (n) Earnings Invested of Excess Passive Earnings Invested in U.S. Property 3 Not Previously Taxed 959(c)(3) balance) (b) Pre-1987 E&P (pre-87 section For Paperwork Reduction Act Notice, see the Instructions for Form 5471. The state of the s INVESTORS LID Undistributed Earnings 959(c)(3) balance) -14, 934. -14,934 -14,934(post-86 section -14,934 (a) Post-1985 ASSET Balance at end of year. (Enter plus line 2a or line 1 minus line 2b) YIELD Amounts included under section Important. Enter amounts in E&P not previously taxed (line 1 Total current and accumulated E&P at end of year (line 1 plus Balance of E&P not previously section 959(c) in current year Balance at beginning of year 951(a) or reclassified under Balance of previously taxed taxed at end of year (line 3 b Current year deficit in E&P nonpreviously taxed E&P whichever is applicable.) SANKATY HIGH Actual distributions of Actual distributions or functional currency. line 4, minus line 5a) previously taxed E&P reclassifications of 2a Current year E&P 5a 6 8 ۵ Δ

JSA 1X1665 1.000

Wor	ksheet C - U.S. Shareholder's Pro Rata Share of Previously Excluded Subpart Withdrawn From Qualified Investments in Less Developed Countries			<u>.</u>
	Investments in Foreign Base Company Shipping Operations	25 ai	id From Qualine	;u
	Enter the amounts on lines 1 through 6a in functional currency.			7
1	Decrease in qualified investments in less developed countries (see Regulations section 1.955-1(b)(1)) and	Γ		
•	foreign base company shipping operations (see Regulations section 1.955A-1(b)(1))	1		
2	Limitation (see Regulations section 1.955-1(b)(2)):	Ė		
a	Enter the sum of E&P for the tax year and E&P accumulated for prior			
	tax years beginning after 1962			
b	Enter the sum of amounts invested in less developed countries or	1		
	foreign base company shipping operations and excluded from foreign			
	base company income for all prior tax years, minus the sum of such		The same of the sa	
	amounts withdrawn for such years (see Regulations section 1.955-1(b)(2)(i)) 2b			
3	Enter the smaller of line 2a or line 2b	3	All the second s	
4	Previously excluded subpart F income withdrawn for the tax year (enter the smaller of line 1 or line 3)	4,6	A. A. A.	
5	U.S. shareholder's pro rata share of line 4 (see Regulations section 1.955-1(c))	5	AND MINES	NONE
6 a	Divide the number of days in the tax year that the foreign corporation was a CFC by the number of days	AP.	The state of the s	
	in the tax year and multiply the result by line 5	6a	7 39	NONE
b	Translate the amount on line 6a from functional currency to U.S. dollars at the average exchange	1	Sin Sign	
	rate. See section 989(b). Enter the result here and on line 3, Schedule I	6 b	1	NONE
Worl	sheet D - U.S. Shareholder's Pro Rata Share of Previously Excluded Export	rade	Income of a Cl	FC
	Withdrawn From Investment in Export Trade Assets Enter the amounts on lines 1 through 7a in functional currency.			
1	Decrease in investments of the CFC in export trade assets (see Regulations section 49/0-1(d)(3))	1	T	
2	U.S. shareholder's pro rata share of line 1	2		
3	U.S. shareholder's pro rata share of the sum of E&P of the CFC for the tax year and E&P	_		
	accumulated for prior tax years beginning after 1962 (see Regulations section 1.970-1(c)(2)(ii))	3		
4	Limitation under section 970(b) (see Regulations section 1.970-1(c)(2)(i)):			
a	U.S. shareholder's pro rata share of the sum of the amounts by		i	
	which the CEC's subpart E income for prior tax years was			
	reduced under section 970(a)			
b	U.S. shareholder's pro rata share of the sum of the amounts that were			
	not included in subpart F income of the CFC for prior fax years because			
	of Regulations section 1.972-1 4b	1		
c	Add lines 4a and 4b			
d	U.S. shareholder's pro rata share of the sum of the amounts that were			
	previously included in his or her gross income for prioritax years under			
525	section 951(a)(1)(A)(ii) because of section 970(b)4d			
5	Subtract line 4d from line 4c	5		
6	Enter the smallest of line 2,3 or \$	6		
7 a	Divide the number of days in the lax year that the foreign corporation was a CFC by the number of days in			
	the tax year and multiply the result by line 6	7 a		
b	Translate the amount on line 7a from functional currency to U.S. dollars at the average exchange	7.		
<u> </u>	rate. See section 989(b). Enter the result here and on line 4, Schedule I	7 b		
	The state of the s			

THE TAXPAYERS EXPECT TO HAVE A FORM 926 FILING REQUIREMENT IN 2011; HOWEVER INFORMATION IS NOT CURRENTLY AVAILABLE OR ESTIMABLE AT THIS TIME.

(Rev. December 2011)

Department of the Treasury Internal Revenue Service

### Return by a U.S. Transferor of Property to a Foreign Corporation

Attach to your income tax return for the year of the transfer or distribution.

OMB No. 1545-0026

Attachment Sequence No. 128

	U.S. Transferor Information (see instructions)	Identifying number (see instructions)
	of transferor	identifying number (see instructions)
PRI	OR YEAR FILING REQUIREMENT	
1	If the transferor was a corporation, complete questions 1a through	
а	If the transfer was a section 361(a) or (b) transfer, was the transfer was the section 361(a) or (b) transfer.	I Van I N-
	5 or fewer domestic corporations?	
b	Did the transferor remain in existence after the transfer?	
	If not, list the controlling shareholder(s) and their identifying num	ber(s):
	Controlling shareholder	Identifying number
С	If the transferor was a member of an affiliated group filing a con	-stringers
	corporation?	Yes No
	If not, list the name and employer identification number (EIN) of	the patent corporation.
	Name of parent corporation	EIN of parent corporation
	The state of the s	
d	Have basis adjustments under section 36Z(a)(5) been made?	Yes No
2	wind the second	actual transferor (but is not treated as such under section 367
	complete questions 2a through 2d.	
a	List the name and EIN of the transferor's partnership:	T
	Name of partnership	EIN of partnership
	The state of the s	
	Did the partner pick up its pro rata share of gain on the transfer	of partnership assets?
D	Is the partner disposing of its entire interest in the partnership?	
ď	Is the partner disposing of an interest in a limited partnership th	
u	securities market?	
Par	Transferee Foreign Corporation Information (see in	
3	Name of transferee (foreign corporation)	4 Identifying number, if any
5	Address (including country)	
6	Country code of country of incorporation or organization (see in	structions)
7	Foreign law characterization (see instructions)	
8	Is the transferee foreign corporation a controlled foreign corpora	ation? Yes No
For E	aperwork Reduction Act Notice, see separate instructions.	Form 926 (Rev. 12-201

THE TAXPAYERS EXPECT TO HAVE A FORM 8886 FILING REQUIREMENT IN 2011; HOWEVER INFORMATION IS NOT CURRENTLY AVAILABLE OR ESTIMABLE AT THIS TIME.

#### Reportable Transaction Disclosure Statement

OMB No. 1545-1800

(Rev. March 2011)

Department of the Treasury

Attach to your tax return.
 See separate instructions.

Attachment Sequence No. 137

	nal Revenue Service	<u>L</u>		parate instructi	ons.				uence No, 137
Name(s) shown on return (individuals enter last name, first name, middle initial)									
		ROMNEY & ANN D I	ROMNEY						
Num	ber, street, and room	or suite no.	City or	town				State	ZIP code
			BEI	MONT				MA	02478
A	If you are filing n	nore than one Form 8886 with y	our tax return, sequ	uentially number					
	each Form 8886	and enter the statement number	er for this Form 888	6	. > Stateme	nt number	1	of	1
В	Enter the form n	umber of the tax return to which	this form is attach	ed or related				104	0
	Enter the year of	the tax return identified above.					▶.	201	1.
	Is this Form 888	6 being filed with an amended ta	x return?				▶₹		Yes No
_							<b>海</b>	Telegra.	- NAMES
C_		s) that apply (see instructions).	Initial y	ear filer	Protective of	fisclosure		THE PERSON NAMED IN	ļ
1 a	Name of reportal	ole transaction				dit.		Sparings.	
		R FILING REQUIRE				-	VI.		
1 b	Initial year partic	ipated in transaction	1c Reportable	e transaction or	r tax shelter reg	istration number (	see instru	actions)	
	Lie Et de l						.89 .89		
2		of reportable transaction. Check	100		- 6		ia"		
а	Listed	c Contractus	l protection	e	Transaction_of i	nterest			
b	Confidential	d Loss			- A	Ė.			
	000 0 0 000			DE 00 1200 100	4150	ASP.			
3		ox 2a or 2e, enter the published		1774	ATT 100	saction			
				7	The state of the s	8"			
4		r of "same as or substantially si		5.5	eller.				
5		ed in this reportable transaction mation below for the entity(s) (se		ASSESSED 15.	(63		check the	e appli	cáble boxes and
			Partnership	aci additional s		Partnership			frust
a	type of entity .		S corporation	-17 - 1-10 - 17 - 17 - 17 - 17 - 17 - 17	Ŧ	S corporat		$\overline{}$	Foreign
		<del>-</del>	3 corporation	15 1500 V	다녔다	Scorporat	ion	1 1	oreign
D	Name		A PENS						
¢		cation number (EIN), if		ALCOP .					
	known			ė					
d	Date Schedule K	-1 received from entity	Spiritar Ch. All						
	(enter "none" if S	Schedule K-1 not	A TOP						
		¥	<b>A</b> 19	700 g 5 10 4 4 14 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				21,000,200	
6		name and address of each light ed, or recommended your part							
	sheets, if necessa		is pation in the se	arisaction, or pri	OVIDED TAX SOV	ice related to the	r transac	atora. pr	macii additional
a	Name		7	100 20	Identifying nu	mber (if known)	Fees pa	aid	
							\$		
	Number, street, a	and room or suite no.		City or town				State	ZIP code
b	Name	The sale			Identifying nu	mber (if known)	Fees pa	aid	7.
- <u> </u>		AND THE PERSON NAMED IN COLUMN TWO IS NOT THE PERSON NAMED IN COLUMN TWO IS NAMED IN				100 TO 10	\$		
	Number, street	and room of suite no.		City or town				State	ZIP code
20	4000en	%b	<u> </u>				000000000		
	A 180	colst(c							10 17 17

(Rev. December 2006)

Department of the Treasury Internal Revenue Service

#### Noncash Charitable Contributions

Attach to your tax return if you claimed a total deduction of over \$500 for all contributed property.

➤ See separate instructions.

OMB No. 1545-0908

Attachment Sequence No. 155

Identifying number

Name(s) shown on your income tax return

WILLARD M ROMNEY & ANN D ROMNEY

Note. Figure the amount of your contribution deduction before completing this form. See your tax return instructions.

Section A. Donated Property of \$5,000 or Less and Certain Publicly Traded Securities - List in this section only items (or groups of similar items) for which you claimed a deduction of \$5,000 or less. Also, list certain publicly traded securities even if the deduction is more than \$5,000 (see instructions).

Par	Informatio	n on Donated P	roperty - If you ne	ed more space, at	ttach a stateme	nt.				
	(a) Name and address of the			(b) Description of donated property						
1		donee organization			(For a donated vehicle, enter the year, make, model, condition, and mileage,					
				and attach Form 1098-C if required.)						
	THE TYLER FOUNDATION BOSTON, MA 02199			7,243 SHS SENSATA TECHNOLOGIES						
A										
В	THE TYLER FOUNDATION									
	BOSTON, MA 02199			19,799 SHS WARNER CHILCOIT						
С	c THE TYLER FOUNDATION									
	BOSTON, MA 02199		8,600 SHS DUNKIN BRANDS							
D					1					
			1	4	4			570		
E				y diffit.						
Note	If the amount you	If the amount you claimed as a deduction for an item is \$50		00 or less yell do not	have to complete	columns (d) (e) and	rn.			
Note	(c) Date of the	(d) Date acquired	(e) How acquired	(f) Donor's cost	(g) Fair market value	(h) Method used to o		10		
	contribution	by donor (mo., yr.)	by donor	or adjusted basis	(see instructions)	the fair market				
Α	VARIOUS	VARIOUS	PSHIP DIST	The same of	232,862.	STOCK QUOTE				
В	VARIOUS	VARIOUS	PSHIP DIST			STOCK QUOTE				
С	VARIOUS	VARIOUS	PSHIP DIST	the state of the s		STOCK QUOTE				
D			60	Actification of Control of Contro						
E			<b>₩</b>							
Par				perty - Complete I						
				implete lines 3a thro		conditions were pla	aced	on a		
<u></u>			-93, 2006,	atement (see instructio						
				ich you gave less than	n an entire interest	<b>&gt;</b>				
	f Part II applies to	more than one prop	erty attach a separate	statement.		_				
b	Total amount claim	ed as a deduction f	or the property listed i	n Part I: (1) For this tax		<u></u>				
		45762	J.	(2) For any pri		P				
		- 100 Live	any such any such	contribution was made	in a prior year (co	omplete only if differe	nt			
	from the donee org	7676 157511 3 4 4 4 4 4 4								
	Tanic or criminate organ									
	Address (number, street)	and room or suite no.)								
	,	A STATE OF THE STA								
	City or town, state and Z	IP code								
	A CONTRACTOR OF THE PARTY OF TH			15 (0.00)	363			30-0-33		
d	For tangible property	enter the place wher	e the property is located	or kept 🕨						
e	Name of any person,	other than the donee	organization, having acti	ual possession of the prop	erty 🕨	999.4-6				
	199				2004 (504) (504)					
3a	ls there a restrictio	n, either temporary	or permanent, on the	donee's right to use o	or dispose of the do	nated	Yes	No		
	property?									
b	Did you give to a	nyone (other than	the donee organizat	ion or another organi	ization participatin	ng with the donee				
	organization in coo	perative fundraisin	g) the right to the in	come from the donat	ted property or to	the possession of				
						y purchase or otherwise, or				
	to designate the person having such income, possession, or right to acquire?									
_ C	is triere a restrictio	n amiting the donate	ed property for a partic	cular user, ,			1			

For Paperwork Reduction Act Notice, see separate instructions.

Form 8283 (Rev. 12-2006)

JSA 1X6400 1.000

Form 8	283 (Rev. 12-2006)	FE_2006866	65,055.55	<u> </u>				Page 2
	s) shown on your incom	e tax return						Identifying number
WIL:	LARD M ROM	NEY & ANN D	ROMNEY					
Secti	on B. Donated	Property Over \$5	,000 (Excep	t Certain	Publicly Traded Sec	urities) - List in th	nis sect	ion only items (or groups of
								s of certain publicly traded
					red for property listed in \$			
Part	Informa	tion on Donated	Property -	To be co	mpleted by the ta	xpayer and/or t	he ap	praiser.
4 0	heck the box that	describes the type	of property do	nated:		г		
	Art* (contribution	on of \$20,000 or more	)	Qualifi	ed Conservation Contribu	tion		quipment
	Art* (contribution	on of less than \$20,00	0)		Real Estate			ecurities
	Collectibles**		l		ctual Property		_	ther
Art incorporation	cludes paintings, sculp imilar objects.	otures, watercolors, print	s, drawings, cera	mics, antiques	, decorative arts, textiles,	carpets, silver, rare m	anuscnp	ts, historical memorabilia, and
**Collec	ctibles include coins, sta	mps, books, gems, jewelr	y, sports memorab	ilia, dolls, etc.,	but not art as defined above.			The state of the s
Note:	In certain cases, you	must attach a qualifie	d appraisal of the				J1991) (1)	D. TE.
5		on of donated property (if			e property was donated, give		overall	(c) Appraised fair
	more space	e, attach a separate state	ment)	phys	sical condition of the proper	y at the time of the gift	dist.	And The Court of t
_A_						485	AS AS	10
В							- QE	di.
C							25	
D						A STATE OF THE PERSON NAMED IN COLUMN TWO IN	See in	structions
	(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's co adjusted bas		g) For bargain sales, enter amount received	(h) Amount claimed		(i) Average trading price
	y conta (ms., p.,	5) 44.54				deduction		of securities
Α_					All Allan	45° ch		
В			9 179 1199	7.				
_C				277777		4	-	
D	П т	(Denes) State	amont list	anah itaw	included in Phot I	phous that the a	nprais	al identifies as having
Part		er (Donor) State of \$500 or less. Se			i included in Part 1	above mat me a	iphi ais	sal identifies as having
Part	ture of taxpayer (don	tion of Appraise	er a party to the tr	ansaction in	which the donor acquir	ed the property, em	Date	by, or related to any of the
forego transa Also, I in the appra- this Fo a subs in con	oing persons, or man action, I performed the I declare that I hold in appraisal, I am qual ised property value, orm 8283 may subject stantial or gross value anection with a returned or testimony by the	rried to any person was majority of my appra myself out to the publified to make appraisa Furthermore, I unders ect me to the penalty	the is related to a sals during my to a san appraise its of the type of that a false under section 67 sulting from the may subject m	any of the tax year for o er or perform property bei or fraudule 701(a) (aldin appraisal of e to the pen	foregoing persons. And, ther persons. appraisals on a regular b ng valued. I certify that the nt overstatement of the p g and abetting the under the value of the property alty under section 6695.	if regularly used by asis; and that because he appraisal fees were property value as des statement of tax liat that I know, or reas A. I affirm that I hav	se of m re not b scribed bility). In	onor, donee, or party to the y qualifications as described ased on a percentage of the in the qualified appraisal or n addition, I understand that should know, would be used been barred from presenting
	<b>e</b> Signature ▶		······································	Titl	· •	Date >		Identifying number
Busine	ess address (including ro	ongor suitenc.)						identifying number
City or	lown, state, and ZIP co	de					1000	
Par	V Dones	Acknowledame	nt - To be co	mpleted h	y the charitable orga	nization.		
	William Contraction	a controlle					receive	d the donated property as
	VIII. 1980.	non acknowledges to int I, above on the follo		ineu organi	Zation under section i	ro(c) and mar it i	1000110	a the deliated property of
	- 55V - 45.					of the property doe	ocibad	in Contine D. Dart 1 for any
portio	on thereof) within 3	ation affirms that in t years after the date o nt does not represent a	f receipt, it will	file Form 82	182, Donee Information I	er the property des Return, with the IRS	and g	in Section B, Part I (or any ive the donor a copy of that
Does	Does the organization intend to use the property for an unrelated use?							
Name	of charitable organizati	on (donee)		100	Employer identification n	umber		
Addre	ss (number, street, and	room of suite no.)		··	City or town, state, and Zil	ode -	5,550	
Autho	rized signature				Title			Date
JSA 1X6410	B 1.0/00						F	form <b>8283</b> (Rev. 12-2006)

This form was prepared for purposes of providing the best available estimate of the taxpayers' tax liability for the year 2011 as of the date indicated. Certain components of income, credits, and deduction to be reported to the IRS are provided to the taxpayers by third parties but have not been received at the time this estimate was prepared. Thus, in certain instances entries on these forms will contain only the best available estimates, or will be incomplete, or blank. This form and the related estimates will be appropriately updated and perfected before being timely filed with the Internal Revenue Service.

This document was not intended or written to be used, and it cannot be used, for the purpose of avoiding U.S. federal, state or local tax penalties. This includes penalties that may apply if the transaction that is the subject of this document is found to lack economic substance or fails to satisfy any other similar rule of law. This document has been prepared pursuant to an engagement between PricewaterhouseCoopers LLP and its Client and is intended solely for the use and benefit of that Client and not for reliance by any other person.



#### SUPPLEMENT TO FORM 1040

QUALIFIED DIVIDENDS

QUALIFIED DIVIDENDS FROM FORM 1099

ABBOTT LABORATORIES

172.

TOTAL FORM 1099 QUALIFIED DIVIDENDS

\_\_\_\_\_\_\_

172.

PSHIP, S CORP. & ESTATE/TRUST QUALIFIED DIVIDENDS

THE ANN AND MITT ROMNEY 1995 FAMILY

THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST 928,869. 256,483.

TOTAL PASS THROUGH QUALIFIED DIVIDENDS

TOTAL TO 1040, LINE 9B

1,905,581.

1,905,753.

SOURCES OF OTHER INCOME

MISC. OTHER INCOME NOTESUBJECT TO S.E. TAX

STATE TAX REFUND WITH NO TAX BENEFIT IN P/Y

LEASE PAYMENT FROM AGUA CALIENTE, LLC

TOTAL TO 1040, LINE 21

-352,905. 100.

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-352,805.

#### SUPPLEMENT TO FORM 1040

#### TAXABLE STATE/LOCAL TAX REFUNDS

ALLOCATION OF STATE/LOCAL TAX REFUND PAID OVER TWO YEARS:	
2 TAXES PAID IN 2010	37,599. 25,000. 62,599.
4 TOTAL REFUND RECEIVED IN 2010	52,905.
5 PERCENTAGE OF TAXES PAID IN 2009 (LINE 1/LINE 3)	50.50%
	78,217.
7 PERCENTAGE OF TAXES PAID IN 2010 (LINE 2/LINE 3)	49.50%
	74,688.
at 168 to	
TAXABLE REFUND:	
1 REFUND ATTRIBUTABLE TO TAXES PARD IN 2009 1	78,217.

3 2009 BASIC STANDARD DEDUCTION: \$5,700, IF SINGLE \$11,400, IF MFJ OR QUALIFYING WIDOW(ER) \$5,700, IF MARRIED FILING SEPARATELY \$8,350, IF HEAD OF HOUSEHOLD

2 2009 ALLOWABLE ITEMIZED DEDUCTIONS

11,400.

- 4 2009 ADDITIONAL STANDAR DEDUCTION(S)
- 5 2009 STATE OR LOCAL REAL ESTATE TAXES
- 6 ENTER \$500 (\$1,000 IF MARRIED FILING JOINTLY)
- 7 SMALLER OF TENE 5 OR LINE 6
- 8 2009 NET DISASTER LOSS FROM FORM 4684
- 9 2009 NEW MOTOR VEHICLE TAXES FROM SCHEDULE A
- 10 ADD LINES 3, 4, 7, 8, AND 9

11 SUBTRACT LINE 10 FROM LINE 2

11,400. 4,507,740.

4,519,140.

12 TAXABLE TAX REFUNDS (SMALLER OF LINES 1 OR 11) 178,217.

\_\_\_\_\_

STATEMENT 2

SUPPLEMENT TO FORM 1040

TAXABLE STATE/LOCAL TAX REFUNDS (CONT'D)

PLUS: TAX REFUNDS RECEIVED FROM PRIOR YEARS

TOTAL TAXABLE REFUND TO FORM 1040, LINE 10

174,688.

**3**52,905

#### SUPPLEMENT TO SCHEDULE A

INVESTMENT INTEREST EXPENSE	The same of the sa
THE ANN AND MITT ROMNEY 1995 FAMILY THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST	13,784. 2,508. 29,741.
SUBTOTAL OF INVESTMENT INTEREST EXPENSE	46,033.
LESS: DISALLOWED INVESTMENT INTEREST EXP. / FORM 4952	NONE
TOTAL TO SCHEDULE A, LINE 14	46,033.
CASH CONTRIBUTIONS	
OTHER CASH CONTRIBUTIONS	
50% ORGANIZATION(S) THE CHURCH OF LATTER-DAY SAINTS 30% ORGANIZATION(S)	2,600,000.
THE TYLER FOUNDATION	500,000.
TOTAL CASH CONTRIBUTIONS BEFORE LIMITATION	3,100,000.
CASH CONTRIBUTION LIMITATION	NONE
TOTAL TO SCHEDULE A, LINE 16	3,100,000.
NONCASH CHARITABLE CONTRIBUTIONS	
NONCASH CONTRIBUTIONS FROM FORM 8283	920,572.
TOTAL NONCASH CONTRIBUTIONS BEFORE LIMITATION	920,572.
NONCASH CONTRIBUTION LIMITATION	NONE
NONCASH CONTRIBUTION LIMITATION TOTAL TO SCHEDULE A, LINE 17	920,572.

\_\_\_\_\_

#### SUPPLEMENT TO SCHEDULE A

OTHER MISC. DEDUCTIONS SUBJECT TO 2% LIMIT

PARTNERSHIP, S CORPORATION AND ESTATE AND TRUST

TOTAL TO SCHEDULE A, LINE 23

490,000.

490,000

INTEREST INCOME FROM SELLER-FINANCED MORTGA	GES
SELLER FINANCED MORT INT	3,045.
TOTAL INT. INC. FROM SELLER-FINANCED MORTGA	GES 3,
OTHER INTEREST INCOME	
MISCELLANEOUS INTEREST INCOME	
ACR ENTERPRISES, INC LOAN (ADR) BANK OF AMERICA - BANK OF AMERICA - BANK OF AMERICA - BANK OF AMERICA -	12, 334. 174. 6. 6. 205.
TOTAL	13,
PART., S CORP., EST. AND TRUST INTEREST INC	OME
THE ANN AND MITT ROMNEY 1995 FAMILY INTERCONTINENTAL REAL ESTATE INVEST THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST	617,362. 17. 23,712. 802,674.
TOTAL	1,443,
U.S. GOVERNMENT BONDS AND OTHER OBLIGATION	INTEREST INCOME
U.S. GOVERNMENT BONDS AND OTHER OBLIGATION  W MITT ROMNEY 1996 CRUT (R BRADFORD  THE ANN AND MITT ROMNEY 1995 FAMILY  THE W. MITT ROMNEY BLIND TRUST  THE ANN D. ROMNEY BLIND TRUST	1,173. 1,173. 954,257. 1,101,824. 581,767.
W MITT ROMNEY 1996 CRUT (R BRADFORD THE ANN AND MITT ROMNEY 1995 FAMILY THE W. MITT ROMNEY BLIND TRUST	1,173. 954,257. 1,101,824.

\_\_\_\_\_

# SUPPLEMENT TO SCHEDULE D

LESS AND OR YEAR CORPORATIONS, ONE HELD ASSETS IIPS, S PARTNERSHIPS, LOSSES AND FROM GAINS SHORT-TERM CAPITAL GAIN - SHORT-TERM GAIN (LOSS) ı ни PART LI NE

## ACTIVITY NAME

FAMILY	1	
	TRUST	TRUST
ROMNEY 1995	ROMNEY BLIND	BILIND
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# TOTAL TO SCHEDULE D, LINE 5

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GAIN/LOSS

923,858.

STATEMENT

# SUPPLEMENT TO SCHEDULE D

THAN ONE AND CORPORATIONS, HELD MORE  $\Omega$ ASSETS PARTNERSHIPS, LOSSES AND FROM GAINS LONG-TERM CAPITAL GAIN
- LONG-TERM GAIN (LOSS) PART II LINE 12

# ACTIVITY NAME

W MITT ROMNEY 1996 CRUT (R BRADFORD THE ANN AND MITT ROMNEY 1995 FAMILY THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST TOTAL LONG-TERM GAINS AND LOSSES FROM K-1'S

TOTAL TO SCHEDULE D, LINE 12

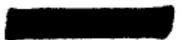
EAIN/LOSS

3,065,013. 1,112,123. 5,104,816.

9,320,634.

9,320,634.

 $\omega$ 



SUPERIORISMI TO SCREDULE (	SUPPI	EMENT.	TO	SCHEDULE	D
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PART	II	LONG-TERM	CAPITAL	GAINS	AND	LOSSES

LINE 13 CAPITAL GAIN DISTRIBUTIONS

NAME OF PAYER	CAPITAL GAINS
THE ANN AND MITT ROMNEY 95 FAMILY TRUST THE ANN D. ROMNEY BLIND TRUST THE W. MITT ROMNEY BLIND TRUST	12,851. 11,811. 14,554.
SUBTOTAL FROM 1099-DIV	39,216.
TOTAL TO SCHEDULE D, LINE 13	39,216.

SUPPLEMENT TO SCHEDULE E

PART II, INCOME OR LOSS FROM PARTNERSHIPS AND S CORPORATIONS

COLUMNS (F) & (G) - PASSIVE INCOME OR LOSS

K-1 NAME: ID NUMBER: INTERCONTINENTAL REAL ESTATE INVESTMENT FUND I, LEG

DESCRIPTION

RENTAL REAL ESTATE INCOME OR LOSS

LESS:

OTHER DEDUCTIONS

ALLOWABLE INCOME/LOSS

THCOME/LOSS

1,602.

1,002.

----

173.

1,429.

TRUSTS
AND
ESTATES
FROM
LOSS
OR
NCOME

PASSIVE DEDUCTION OTHER INCOME OR LOSS INCOME FROM K-1 FROM K-1 FROM K-1	336,733. 2,288,655. NONE	2,625,388.
PASSIVE COSS OR DABBUCT FROM 8582	-1, 211.	-1,211. ===================================
(B) EIN		TOTAL
( A) NAME	W MITT ROMNEY 1996 CRUT (R BRADFORD MALT, TR THE ANN AND MITT ROMNEY 1995 FAMILY TRUST THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST THE ANN AND MITT ROMNEY 1995 FAMILY TRUST THE W. MITT ROMNEY BLIND TRUST	

#### SUPPLEMENT TO SCHEDULE E

PART III, INCOME OR LOSS FROM ESTATES AND TRUSTS \_\_\_\_\_\_ COLUMNS (C) & (D) - PASSIVE INCOME OR LOSS

THE ANN AND MITT ROMNEY 1995 FAMILY TRUST K−1 NAME: ID NUMBER:

\_\_\_\_\_

DESCRIPTION

ORDINARY INCOME OR LOSS

INVESTMENT INTEREST EXPENSE

ALLOWABLE INCOME/LOSS

FNCOME/LOSS

350,000.

13,267.

336,733.

K-1 NAME:

THE W. MITT ROMNEY BLIND TRUST

ID NUMBER:

DESCRIPTION

ORDINARY INCOME OR LOSS

ALLOWABLE INCOME/LOSS

INCOME/LOSS

-1,211.

==========

-1,211.

K-1 NAME:

THE ANN DEROMNEY BLIND TRUST

ID NUMBER:

DESCRIPTION

ORDINARY INCOME OR LOSS

ALLOWABLE INCOME/LOSS

INCOME/LOSS

2,288,655.

2, 288, 655. \_\_\_\_

#### SUPPLEMENT TO SCHEDULE E

PART III, INCOME OR LOSS FROM ESTATES AND TRUSTS \_\_\_\_\_\_\_ COLUMNS (E) & (F) - NON PASSIVE INCOME OR LOSS

K-1 NAME; ID NUMBER: THE ANN AND MITT ROMNEY 1995 FAMILY TRUST

DESCRIPTION

ORDINARY INCOME OR LOSS

ALLOWABLE INCOME/LOSS

197,624.

197,624.

STATEMENT 13

SUPPLEMENT TO SCHEDULE SE

TAXPAYER'S NET SELF-EMPLOYMENT INCOME

NET NONFARM PROFIT OR (LOSS)

SCHEDULE C

TOTAL NET NONFARM PROFIT OR (LOSS), SECTION A, LINE 2

110,500.

110,500.

#### ITEMIZED DEDUCTIONS NOT DIRECTLY ALLOCABLE TO FOREIGN SOURCE INCOME

TOTAL ITEMIZED DEDUCTIONS

LESS:

ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO U.S. SOURCES SCHEDULE A INTEREST EXPENSE

ITEMIZED DEDUCTIONS NOT DIRECTLY ALLOCABLE

5,688,179

4,092,550. 46,033.

1,549,596.

\_\_\_\_\_

STATEMENT 15

#### FOREIGN TAX CREDIT CARRYBACK/CARRYOVER - PASSIVE CATEGORY INCOME

YEAR CREDIT AROSE	TTL. FOREIGN TAXES PAID	FOREIGN TAX CREDIT USED	ADJUSTMENT FOR REFUND	BALANCE
				THE TAX THE TA
2001	25,771.	25,771.	-	
2002	28,875.	28,875.	-33	480° 480.
2003	11,173.	11, 173.		
2004	87,550.	87,550.		4000
2005	333,149.	333,149.	A The	
2006	276,386.	276,386.		
2007	275,488.	275,488.		
2008	151,015.	151,015.		
2009	81,461.	62,524.4	Western	18,937.
2010	67,173.	67,173.	250 min 1965 (20)	
		done.	1	
TOTAL CARRYBA	CK/CARRYOVER TO	2011		18,937.
		08 Higgs		========

# ADJUSTMENTS TO LINE 15 - PASSIVE CATEGORY INCOME

ALLOCATION OF LOSSES FROM OTHER CATEGORIES

NONE

TOTAL ADJUSTMENTS

NONE

#### FOREIGN TAX CREDIT CARRYOVERS TO 2012 - PASSIVE CATEGORY INCOME

CARRYOVER YEAR	TTL. FOREIGN TAXES PAID	FOREIGN TAX	CARRYBACK TO PRIOR YR	BALANCE
2001	25,771.	25,771.	- N/A -	A STATE OF THE PARTY OF THE PAR
2002 2003	28,875. 11,173.	28,875. 11,173.	*	
2004	87,550.	87,550.		A STATE OF THE PARTY OF THE PAR
2005 2006	333,149. 276,386.	333,149. 276,386.		
2007	275,488.	275,488.		
2008 2009	151,015. 81,461.	151,015. 62,524.		18,937.
2010 2011	67,173.	67,173.	P. Carrier	
	IVE CATEGORY I	NCOME **		
CARRYOVE	RS TO 2012	400 E	Parties and the same of the sa	18,937.

#### FOREIGN TAX CREDIT CARRYBACK/CARRYOVER - GENERAL CATEGORY INCOME

YEAR CREDIT AROSE	TTL. FOREIGN	FOREIGN TAX CREDIT USED	ADJUSTMENT FOR REFUND	BALANCE
2007 2008	148,510. 636,440. 56,891.	125,879. 559,061. 56,891.		22,631. 77,379.
2009 2010	690.	30, 691.		690.
TOTAL CARRYBA	CK/CARRYOVER T	0 2011		100,700.

# ADJUSTMENTS TO LINE 15 GENERAL CATEGORY INCOME

ALLOCATION OF LOSSES FROM OTHER CATEGORIES

NONE
TOTAL ADJUSTMENTS

NONE

\_\_\_\_\_\_

FOREIGN TAX	CREDIT	CARRYOVERS	TO	2012	-	GENERAL	CATEGORY	I NCOME.
LOWET ON TWY	CLUDDIT	CULLITOATIO	10	2012		OFIABLW	O111 DO01/1	1110011

				90000000000
CARRYOVER	TTL. FOREIGN	FOREIGN TAX	CARRYBACK	AGO COLLEGE
YEAR	TAXES PAID	CREDIT USED	TO PRIOR YR	BALANCE 🔌
2001			- N/A -	AL VENEZIONE
2002			€	Sh. 49
2003			A 19	
2004			A STATE OF THE PARTY OF THE PAR	Alle Marie
2005			** _ ##	26.
2006			A A	4.00x
2007	148,510.	125,879.		22,631.
2008	636,440.	559,061.		77,379.
2009	56,891.	56,891.		
2010	690.		A STATE OF THE PARTY OF THE PAR	690.
2011		-chillin	W.	
TOTAL GENE	RAL CATEGORY I	NCOME	A.	
	RS TO 2012		EAST OF THE PARTY	100,700.
		of Figure	25	

# WORKSHEET FOR LINE 18 USING WORLDWIDE QUALIFIED DIVIDENDS AND CG TAX WORKSHEET AMOUNTS

1.	AMOUNT FROM FORM 1040, LINE 41	15212896.
	N/A	PARTITION NAMED IN
3.	N/A	
	N/A	A.
5.	N/A 2	
6.	WORLDWIDE 15% GAINS (CG TAX WS, LINE 14) 11515850.	
7.	MULTIPLY LINE 6 BY .5714 6,5%0,157.	
8.	WORLDWIDE 0% GAINS (CG TAX WS, LINE 11)	
0	ADD ITMES 7 AND 8	6,580,157.
10.	SUBTRACT LINE 9 FROM LINE 1	8,632,739.

# SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

#### FOREIGN TAX CREDIT CARRYBACK/CARRYOVER - GENERAL CATEGORY INCOME

YEAR CREDIT AROSE	TTL. FOREIGN	FOREIGN TAX	ADJUSTMENT FOR REFUND	BALANCE
2007 2008	148,510. 636,440.	131,372. 534,332.		17,138. 102,108.
2009 2010	56,891. 690.	56,891.		690.
TOTAL CARRYBA	CK/CARRYOVER T	0 2011		119,936.

#### SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

FOREIGN TAX	CREDIT	CARRYOVERS	TO	2012	 GENERAL	CATEGORY	INCOME

CARRYOVER YEAR	TTL. FOREIGN	FOREIGN TAX	CARRYBACK TO PRIOR YR	BALANCE
2001			- N/A -	
2002			. 4	A TOP
2003				
2004			APP TEN	Target St.
2005				h.
2006			1	- T
2007	148,510.	131,372.		17,138.
2008	636,440.	534,332.		102,108.
2009	56,891.	56,891.		
2010	690.	NONE	A CONTRACTOR OF THE PARTY OF TH	690.
2011		_495766	The same of the sa	
TOTAL GENE	RAL CATEGORY I	NCOME 4	d9to.	
CARRYOVE	RS TO 2012			119,936.
		All Million		==========



# WORKSHEET FOR LINE 18

\_\_\_\_\_\_

1.	AMOUNT FROM FORM 6251, LINE 28
2.	N/A
3.	N/A
	WORLDWIDE 25% GAINS (FORM 6251, LINE 50)
	MULTIPLY LINE 4 BY .1071
	WORLDWIDE 15% GAINS (FORM 6251, LINE 48) 11515850
	MULTIPLY LINE 6 BY .4643
	WORLDWIDE 0% GAINS (FORM 6251, LINE 47)
9.	ADD LINES 5, 7 AND 85,346,809.
10.	SUBTRACT LINE 9 FROM LINE 1

#### SUPPLEMENT TO FORM 1116 - ALTERNATIVE MINIMUM TAX

RATABLY ALLOCABLE ITEMIZED DEDUCTIONS	The state of the s
ITEMIZED DEDUCTIONS BEFORE PHASE-OUT	4,066,751.
LESS: ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO U.S. SOURCES	4,020,572.
ITEMIZED DEDUCTIONS DIRECTLY ALLOCABLE TO FOREIGN SOURCES	NONE 46,033.
INTEREST EXPENSE  TOTAL DIRECTLY ALLOCABLE ITEMIZED DEDUCTIONS	4,066,605.
RATABLY ALLOCABLE ITEMIZED DEDUCTIONS	146.

\_\_\_\_\_\_

# GROSS INCOME RECOMPUTED FOR ALTERNATIVE MINIMUM TAX

GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF	
ITEMIZED DEDUCTIONS (REGULAR TAX)	
PLUS ADJUSTMENTS AND PREFERENCES RELATED TO INCOME	NONE
GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF	
ITEMIZED DEDUCTIONS (ALTERNATIVE MINIMUM TAX)	NONE
LESS EXCLUDED AND EXEMPT INCOME	
PLUS AMOUNT FROM FORM 6251, LINE 12	NONE
The state of the s	
GROSS INCOME FROM ALL SOURCES FOR ALLOCATION OF	
INTEREST DEDUCTION (ALTERNATIVE MINIMUM TAX)	NONE
The state of the s	

PASSIVE ACTIVITY LOSS			A CONTRACTOR OF THE PARTY OF TH
DESCRIPTION	REGULAR INC./LOSS	AMT INC./LOSS	PASSIVE ADJUSTMENT
INTERCONTINENTAL REAL ESTATE INVEST	1,429.	1,430	1.
TOTAL TO FORM 6251, LINE 19			1.
PASSIVE ACTIVITY - INCOME AND LOSS DET	TAIL		
		REGULAR INC./LOSS	AMT INC./LOSS
ACTIVITY - INTERCONTINENTAL REAL ESTA	ATE LOVEST		
RENTAL REAL ESTATE INCOME OR LOSS LESS: OTHER DEDUCTIONS		1,602. 173.	
REGULAR INCOME OR LOSS BEFORE LIMITATE PLUS: POST-86 DEPRECIATION ADJUSTMENT		1,429.	1,429. 1.
AMT INCOME OR LOSS BEFORE LIMITATIONS		-	1,430.
ALLOWABLE INCOME OR LOSS		1,429.	1,430.
LINE 29 - EXEMPTION WORKSHEET			
1. \$47,450. IF SINGLE OR HEAD OF HOU \$72,450. IF MARRIED FILING JT. OF \$36,225. IF MARRIED FILING SEPARA	R QUAL. WIDOW	(ER)	74,450.
2. ALTERNATIVE MINIMUM TAXABLE INCOM	E, LINE 28 1	6,834,325.	
3. \$112,500. IF SINGLE OR HEAD OF HOW \$150,000. IF MFJ OR QUAL. WIDOW(ED) \$75,000. IF MARRIED FILING SEPARA	R)	150,000.	

STATEMENT 25

LINE 29 - EXEMPTION WORKSHEET (CONT'D)

4. LINE 2 LESS LINE 3

5. MULTIPLY LINE 4 BY 25%

6. EXEMPTION AMOUNT (LINE 1 LESS LINE 5)

16,684,325

4,171,081

NON

	4.00				
LINE	42	_	WOR	KS	HEET

1	AMOUNT	FROM	FORM	6251.	T.T NE	41

LINE 1 MULTIPLIED BY 28%

3. \$3,500 OR \$1,750 IF MARRIED FILING SEPARATELY

4. TOTAL TO FORM 6251, LINE 42 (LINE 2 LESS LINE 3)

5, 318, 475.

1, 489, 173.

§ 3,500.

1,485,673.

# LINE 53 - WORKSHEET

1. AMOUNT FROM FORM 6251, LINE 36

LINE 1 MULTIPLIED BY 28%

3. \$3,500 OR \$1,750 IF MARRIED FILING SEPARATELY

4. TOTAL TO FORM 6251, LINE 53 (LINE 2 LESS LINE 3)

16,834,325.

4,713,611.

3,500.

4,710,111.

#### DETAIL OF INVESTMENT INTEREST EXPENSE

CURRENT YEAR PRIOR YEAR

#### DESCRIPTION

THE ANN AND MITT ROMNEY 1995 FAMILY THE W. MITT ROMNEY BLIND TRUST THE ANN D. ROMNEY BLIND TRUST

TOTAL INVESTMENT INTEREST EXPENSE

		DISAL	LOWED
INV.	INT	NNI	INT.
1:	3,784. 2,508		

philipperson.

GAIN	FROM	INVESTMENT	PROPERTIES

	ORDINARY	SHORT T	ERM	LONGST	ERM
	GAIN	LOSS	GAIN	LOSS	GAIN
CAP. GAIN DIST SCHEDULE D FORM 6781		45,897.	969,755. 166,224		39,216. 9,320,634. 249,337.
TOTAL		45,897.	1,135,949	# -#	9,609,187.
NET GAIN - PROP	PERTY HELD FOR	INVESTMENT -	FORM 4952 L	INE 4D	10,699,269.
ELECTION 1	TO INCLUDE QUA	L. DIV. & NETTO	AP. GAIN AS I	NV. INCOME	
GROSS INCOME EX		h simil		5,362,270. 1,090,082.	
TOTAL INCOM	ME BEFORE CAPI	IAL GAIN			6,452,352.
TOTAL INVESTMENT EXPE	1936 350		4952 LN. 3	46,033. 71,978.	
TOTAL EXPE	WES				118,011.
EXCESS TOTAL EX	KPENSES OVER T	OTAL INCOME			NONE
QUALIFIED DIVII	DENDS				1,905,753.
NET LONG-TERM ONET SHORT-TERM	CAPITAL GAIN - CAPITAL LOSS			9,609,187. NONE	
NET CAPITAL GAS	IИ				9,609,187.
NET CAPITAL GA	N YOU MAY ELE	CT TO REPORT	AS ORDINARY		NONE

CONTINUED ...

STATEMENT 29

ELECTION TO INCLUDE QUAL. DIV. & NET CAP. GAIN AS INV. INCOME (CONT QUALIFIED DIVIDENDS YOU MAY ELECT TO INCLUDE IN INV. INC. NONE NET CAPITAL GAIN ELECTED TO BE REPORTED AS ORDINARY NONE QUALIFIED DIVIDENDS ELECTED TO BE INCLUDED IN INV. INC. NONE

TOTAL ELECTION TO BE INCLUDED IN INVESTMENT INCOME - FORM 4952 LINE 4G

NONE

DET	AIL OF INVESTMENT INCOME MINUS EXPENSES	
1. 2. 3. 4. 5.	CHILD'S INCOME FROM FORM 8814	
7.	GROSS INVESTMENT INCOME	7,268,023.
8.	QUALIFIED DIVIDENDS	1,905,753.
9.	GROSS INVESTMENT INCOME EXCLUDING QUALIFIED DIV	5,362,270.
	ORDINARY SECTION 1245, 1250 & 1254 INCOME	
	NET CAPITAL GAIN FROM INVESTMENT PROPERTY 9,609,187.	
12. 13.	NET GAIN FROM INVESTMENT PROPERTY	1,090,082.
	INVESTMENT INCOME ELECTION	NONE
15.	TOTAL INVESTMENT INCOME	6,452,352.
16.	ROYALTY EXPENSES	
17.	INVESTMENT EXPENSES 71,978.	_
18.	TOTAL INVESTMENT EXPENSES	71,978.
19.	TOTAL NET INVESTMENT INCOME	6,380,374.

#### SUPPLEMENT TO FORM 4952 - AMT

#### GAIN FROM INVESTMENT PROPERTIES - AMT

		SHORT LOSS		LONG T	TERM GAIN
CAP. GAIN DIST SCHEDULE D FORM 6781		45,897.	969,755. 166,224.		39,216. 9,320,634. 249,337.
TOTAL		45,897.	1,135,979.		9,609,187.
NET GAIN - PRO	PERTY HELD FOR	INVESTMENT	- FORM 4952 I	INE 4D	10,699,269. =======
ELEC. TO INCL	UDE QUAL. DIV. &	NET CAP. GAI	N AS INV. INC.	- AMT	
GROSS INCOME E				5,362,270. 1,090,082.	
TOTAL INCO	ME BEFORE CAPIT	AL GALN	8 <sup>1</sup>		6,452,352.
TOTAL INVESTMENT EXP	100	- Mr. 1970	RM 4952 LINE 3	46,033.	
TOTAL EXPE	NSES /				46,033.
EXCESS TOTAL E	XPENSES OVER TO	TAL INCOME			NONE
QUALIFIED DIVI	DENDS				1,905,753.
200.	CAPITAL GAIN - CAPITAL LOSS -			9,609,187. NONE	
NET CAPITAL GA	ĪN				9,609,187.
	IN YOU MAY ELEC DENDS YOU MAY E			INC.	NONE NONE
NET CAPITAL GA QUALIFIED DIVI	IN ELECTED TO E DENDS ELECTED I	SE REPORTED O BE INCLUI		ic.	NONE NONE

Form prepared based on best available estimates, which will be appropriately updated prior to filing, See Statement A

STATEMENT

32

CONTINUED ...

SUPPLEMENT TO FORM 4952 - AMT

ELEC. TO INCLUDE QUAL. DIV. & NET CAP. GAIN AS INV. INC. - AMT (CONT'D)

TOTAL ELECTION TO BE INCLUDED IN INVESTMENT INCOME
- FORM 4952 AMT LINE 4G

NONE

STATEMENT 33

#### SUPPLEMENT TO FORM 4952 - AMT

DET	ALL OF INVESTMENT INCOME MINUS EXPENSES FOR ALT. MIN. TAX	The state of the s
2. 3. 4. 5.	CHILD'S INCOME FROM FORM 8814  INTEREST INCOME	
	GROSS INVESTMENT INCOME	7,268,023. 1,905,753.
10.	GROSS INVESTMENT INCOME EXCLUDING QUALIFIED DIV	5,362,270.
12. 13. 14.	ORDINARY SECTION 1245, 1250, & 1254 INCOME  NET CAPITAL GAIN FROM INVESTMENT PROPERTY 9,609,187.  NET GAIN FROM INVESTMENT PROPERTY	1,090,082. NONE
16.	TOTAL INVESTMENT INCOME	6,452,352.
18.	ROYALTY EXPENSES	
20.	TOTAL INVESTMENT EXPENSES	
21.	TOTAL NET INVESTMENT INCOME	6,452,352.

ORKSHEET 3 - FOR FO	KM 8582, LIT	NE 3A, 3B,	AND 3C		
NAME OF ACTIVITY	CURREN	NT YEAR	PRIOR YEARS	OVERALL	GAIN OR LOSS
		(B) NET LOSS	(C) UNALLOWED LOSS	(D) GAIN	(E) LOSS
MITT ROMNEY 1996 THE ANN AND MITT RO INTERCONTINENTAL RE THE W. MITT ROMNEY THE ANN D. ROMNEY B ROB ROM ENTERPRISES	1,429.	1,211		336, 733 1,429 2,288,655	1,211.
TOTAL	2,626,817.	1,211	. NONE	All Control of the Co	

SUPPLEMENT TO 8582 WOR	KSHEET 3 - 1	AMT				
WORKSHEET 3 - FOR FO	RM 8582, LI	VE 3A, 3E	, AND 3C			
NAME OF ACTIVITY	CURRE	NT YEAR	PRIOR YEARS	OVÊRALL	GAIN OR LOSS	
			(C)UNALLOWED	(D)GAIN	(E) LOSS	
W MITT ROMNEY 1996 THE ANN AND MITT RO INTERCONTINENTAL RE THE W. MITT ROMNEY THE ANN D. ROMNEY B ROB ROM ENTERPRISES	1,430.	1,21	1.	336, 733 1, 430 2, 288, 655	1,211.	
TOTAL	2,626,818.	1,21	1.			

#### SUPPLEMENT TO FORM 8582-CR

TAX ATTRIBUTABLE TO PASSIVE INCOME - LINE 6

TOTAL TAX LIABILITY

TAXABLE INCOME INCLUDING PASSIVE INCOME

LESS: NET PASSIVE INCOME FROM FORM 8582

PLUS: LOSSES FROM DISPOSITION

INCOME WITHOUT PASSIVE INCOME LESS: TAX ON NON-PASSIVE INCOME

TAX ATTRIBUTABLE TO PASSIVE INCOME, LINE 6

2,988,626

15,205,496. 2,625,606.

12,579,890

2,069,664.

918,962.

STATEMENT

37

SUPPLEMENTAL SCHEDULES TO FORM 5471		
SANKATY HIGH YIELD ASSET INVESTORS LTD.		
SCHEDULE C - LINE 8, OTHER INCOME	FUNCTIONAL CURRENCY	U. S. DOLLARS
OTHER INCOME		
TOTAL OTHER INCOME		
SCHEDULE C - LINE 16, OTHER DEDUCTIONS	FUNCTIONAL CURRENCY	U. S. DOLLARS
FOREIGN TAX ADJUSTMENT PORTFOLIO DEDUCTION	-	
TOTAL OTHER DEDUCTIONS		
TOTAL OTHER DEDUCTIONS		

SUPPLEMENTAL SCHEDULES TO FORM 5471

SANKATY HIGH YIELD ASSET INVESTORS LTD.

	BEGI NNI NG	ENDI NG
SCHEDULE F - LINE 7, OTHER INVESTMENTS	BALANCE	BALANCE
	£	
INVESTMENTS	10,432	
TOTAL OTHER INVESTMENTS	10, 432.	*