

**Label** (See instructions on page 14.) Use the IRS label. Otherwise, please print or type. **Presidential Election Campaign** Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 14)  You  Spouse

**LABEL HERE**

For the year Jan. 1-Dec. 31, 2009, or other tax year beginning \_\_\_\_\_, 2009, ending \_\_\_\_\_, 20

OMB No. 1545-0074

Your first name and initial **TIMOTHY M.** Last name **KAINE** Your social security number [REDACTED]

If a joint return, spouse's first name and initial **ANNE B.** Last name **HOLTON** Spouse's social security number [REDACTED]

Home address (number and street). If you have a P.O. box, see page 14. Apt. no. You must enter ▲ your SSN(s) above.▲

City, town or post office, state, and ZIP code. If you have a foreign address, see page 14. Checking a box below will not change your tax or refund.

**RICHMOND, VA 23227-4405**

**Filing Status**

1  Single 4  Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here. ▶ \_\_\_\_\_

2  Married filing jointly (even if only one had income)

3  Married filing separately. Enter spouse's SSN above and full name here. ▶ \_\_\_\_\_

5  Qualifying widow(er) with dependent child (see page 16)

Check only one box.

**Exemptions**

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

b  Spouse

**c Dependents:**

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> If qualifying child for child tax credit (see page 17)
NATHANIEL	KAINE	[REDACTED]	SON	
LINWOOD	KAINE	[REDACTED]	SON	
ANNELLA	KAINE	[REDACTED]	DAUGHTER	X

Boxes checked on 6a and 6b **2**

No. of children on 6c who:  
 lived with you **3**  
 did not live with you due to divorce or separation (see page 18)

Dependents on 6c not entered above

Add numbers on lines above **5**

d Total number of exemptions claimed **5**

**Income**

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	174,100.
8a	Taxable interest. Attach Schedule B if required	8a	586.
b	Tax-exempt interest. Do not include on line 8a	8b	
9a	Ordinary dividends. Attach Schedule B if required	9a	1,078.
b	Qualified dividends (see page 22)	9b	1,078.
10	Taxable refunds, credits, or offsets of state and local income taxes	10	164.
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	27.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	
b	Taxable amount	15b	
16a	Pensions and annuities	16a	
b	Taxable amount	16b	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	0.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation in excess of \$2,400 per recipient (see page 27)	19	
20a	Social security benefits	20a	
b	Taxable amount (see page 27)	20b	
21	Other income. List type and amount (see page 29)	21	
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	175,955.

**Adjusted Gross Income**

23	Educator expenses (see page 29)	23	
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	Health savings account deduction. Attach Form 8889	25	
26	Moving expenses. Attach Form 3903	26	
27	One-half of self-employment tax. Attach Schedule SE	27	
28	Self-employed SEP, SIMPLE, and qualified plans	28	
29	Self-employed health insurance deduction (see page 30)	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶ _____	31a	
32	IRA deduction (see page 31)	32	
33	Student loan interest deduction (see page 34)	33	
34	Tuition and fees deduction. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 31a and 32 through 35	36	
37	Subtract line 36 from line 22. This is your adjusted gross income	37	175,955.

Tax and Credits

Standard Deduction for -

People who check any box on line 39a, 39b, or 40b OF who can be claimed as a dependent.

All others:

Single or Married filing separately, \$5,700

Married filing jointly or Qualifying widow(er), \$11,400

Head of household, \$8,350

38 Amount from line 37 (adjusted gross income) 175,955. 39a Check boxes for birth date and blindness. 40a Itemized deductions (from Schedule A) or your standard deduction 32,312. 41 Subtract line 40a from line 38 143,643. 42 Exemptions 18,250. 43 Taxable income 125,393. 44 Tax 23,613. 45 Alternative minimum tax. 46 Add lines 44 and 45 23,613. 47 Foreign tax credit. 48 Credit for child and dependent care expenses. 49 Education credits from Form 8863, line 29. 50 Retirement savings contributions credit. 51 Child tax credit. 52 Credits from Form: a 8396 b 8839 c 5695. 53 Other credits from Form: a 3800 b 8801 c. 54 Add lines 47 through 53. 55 Subtract line 54 from line 46. 56 Self-employment tax. 57 Unreported social security and Medicare tax. 58 Additional tax on IRAs. 59 Additional taxes: a AEIC payments b Household employment taxes. 60 Add lines 55 through 59. 23,613.

Other Taxes

56 Self-employment tax. 57 Unreported social security and Medicare tax. 58 Additional tax on IRAs. 59 Additional taxes: a AEIC payments b Household employment taxes. 60 Add lines 55 through 59. 23,613.

Payments

If you have a qualifying child, attach Schedule EIC.

61 Federal income tax withheld from Forms W-2 and 1099 29,509. 62 2009 estimated tax payments and amount applied from 2008 return. 63 Making work pay and government retiree credits. 281. 64a Earned income credit (EIC). 64b Nontaxable combat pay election. 65 Additional child tax credit. 66 Refundable education credit from Form 8863, line 16. 67 First-time homebuyer credit. 68 Amount paid with request for extension to file. 69 Excess social security and tier 1 RRTA tax withheld. 70 Credits from Form: a 2439 b 4136 c 8801 d 8885. 71 Add lines 61, 62, 63, 64a, and 65 through 70. 29,790.

Refund

Direct deposit? See page 73 and fill in 73b, 73c, and 73d, or Form 8888.

72 If line 71 is more than line 60, subtract line 60 from line 71. 6,177. 73a Amount of line 72 you want refunded to you. 6,177. 74 Amount of line 72 you want applied to your 2010 estimated tax.

Amount You Owe

75 Amount you owe. Subtract line 71 from line 60. 76 Estimated tax penalty (see page 74).

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 75)? [X] Yes. Complete the following. [ ] No. Designee's name MALCOLM P. FRIDDELL Phone no 804-697-1200 Personal identification number (PIN)

Sign Here

Declaration of preparer: I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Your signature: [Signature] Date: [ ] Your occupation: ATTORNEY Daytime phone number: ( ) - . Spouse's signature: [Signature] Date: [ ] Spouse's occupation: ATTORNEY

Paid Preparer's Use Only

Preparer's signature: [Signature] Date: [ ] Check if self-employed: [ ] Preparer's SSN or PTIN: [Redacted] Firm's name (or yours if self-employed), address, and ZIP code: TROUTMAN SANDERS LLP, 1001 HAXALL POINT, RICHMOND VA 23219. EIN: [Redacted] Phone no: 804-697-1200

**SCHEDULE A  
(Form 1040)**

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

**Itemized Deductions**

▶ Attach to Form 1040. ▶ See Instructions for Schedule A (Form 1040).

OMB No. 1545-0074

**2009**  
Attachment  
Sequence No. 07

Your social security number

**TIMOTHY M. KAINE & ANNE B. HOLTON**

<b>Medical and Dental Expenses</b>		<b>Caution.</b> Do not include expenses reimbursed or paid by others.			
1	Medical and dental expenses (See page A-1.)	1			
2	Enter amount from Form 1040, line 38	2			
3	Multiply line 2 by 7.5% (.075)	3			
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4			
<b>Taxes You Paid</b>		<b>5 State and local (check only one box):</b>			
(See page A-2.)		a <input checked="" type="checkbox"/> Income taxes, or		5	9,319.
		b <input type="checkbox"/> General sales taxes		6	637.
6	Real estate taxes (See page A-5.)	6			
7	New motor vehicle taxes from line 11 of the worksheet on page 2. Skip this line if you checked box 5b	7			
8	Other taxes. List type and amount <b>PERSONAL PROPERTY TAX</b> 94.	8		94.	
9	Add lines 5 through 8	9			10,050.
<b>Interest You Paid</b>		<b>10 Home mortgage interest and points reported to you on Form 1098</b> STMT 2		10	824.
(See page A-6.)		<b>11 Home mortgage interest not reported to you on Form 1098.</b> If paid to the person from whom you bought the home, see page A-7 and show that person's name, identifying no., and address		11	
<b>Note.</b> Personal interest is not deductible.		12 Points not reported to you on Form 1098		12	
		13 Qualified mortgage insurance premiums (See page A-7.)		13	
		14 Investment interest. Attach Form 4952 if required. (See page A-8.)		14	
		15 Add lines 10 through 14		15	824.
<b>Gifts to Charity</b>		<b>16 Gifts by cash or check</b>		16	21,530.
If you made a gift and got a benefit for it, see page A-8.		<b>17 Other than by cash or check.</b> If any gift of \$250 or more, see page A-8. You must attach Form 8283 if over \$500		17	
		<b>18 Carryover from prior year</b>		18	
		<b>19 Add lines 16 through 18</b>		19	21,530.
<b>Casualty and Theft Losses</b>		<b>20 Casualty or theft loss(es).</b> Attach Form 4684. (See page A-10.)		20	
<b>Job Expenses and Certain Miscellaneous Deductions</b>		<b>21 Unreimbursed employee expenses - job travel, union dues, job education, etc.</b> Attach Form 2106 or 2106-EZ if required. (See page A-10.)		21	
(See page A-10.)		22 Tax preparation fees		22	2,304.
		23 Other expenses - investment, safe deposit box, etc. List type and amount		23	
		24 Add lines 21 through 23		24	2,304.
		25 Enter amount from Form 1040, line 38		25	175,955.
		26 Multiply line 25 by 2% (.02)		26	3,519.
		27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-		27	0.
<b>Other Miscellaneous Deductions</b>		<b>28 Other - from list on page A-11.</b> List type and amount		28	
<b>Total Itemized Deductions</b>		<b>29 Is Form 1040, line 38, over \$166,800 (over \$83,400 if married filing separately)?</b>		29	32,312.
		<input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40a.			
		<input checked="" type="checkbox"/> Yes. Your deduction may be limited. See page A-11 for the amount to enter.			
<b>30</b> if you elect to itemize deductions even though they are less than your standard deduction, check here					

**SCHEDULE B**  
**(Form 1040A or 1040)**

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

**Interest and Ordinary Dividends**

▶ Attach to Form 1040A or 1040.

▶ See instructions.

OMB No. 1545-0074

**2009**  
Attachment  
Sequence No. **08**

**TIMOTHY M. KAINE & ANNE B. HOLTON**

Your social security number

**Part I**  
**Interest**

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

DEUTSCHE BANK ALEX BROWN  
SUNTRUST  
SUNTRUST  
WACHOVIA BANK

**Amount**

54.  
229.  
296.  
7.

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

**2** Add the amounts on line 1 ..... **2** 586.  
**3** Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815 ..... **3**  
**4** Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ... ▶ **4** 586.

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

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

**5** List name of payer ▶  
AMERICAN CENTURY INVESTMENTS  
GENERAL ELECTRIC CO

**Amount**

35.  
1,043.

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

**6** Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ... ▶ **6** 1,078.

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

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

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

**7a** At any time during 2009, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? See page B-2 for exceptions and filing requirements for Form TD F 90-22.1

**b** If "Yes," enter the name of the foreign country ▶

**8** During 2009, 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 page B-2

	Yes	No
7a		X
8		X

927501  
10-20-09

**SCHEDULE D  
(Form 1040)**

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

**Capital Gains and Losses**

▶ Attach to Form 1040 or Form 1040NR. ▶ See instructions for Schedule D (Form 1040).  
▶ Use Schedule D-1 to list additional transactions for lines 1 and 8.

OMB No. 1545-0074

**2009**  
Attachment  
Sequence No. 12

Your social security number

**TIMOTHY M. KAINE & ANNE B. HOLTON**

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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss) Subtract (e) from (d)
1 0.100 SH TELEFONAKTIEBOLAGET LM ER	VARIOUS	06/10/09	1.	0.	1.
2 Enter your short-term totals, if any, from Schedule D-1, line 2			2		
3 <b>Total short-term sales price amounts.</b> Add lines 1 and 2 in column (d)			3	1.	
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824					4
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1					5
6 Short-term capital loss carryover. Enter the amount, if any, from line 10 of your <b>Capital Loss</b> <b>Carryover Worksheet</b> in the instructions					6 ( )
7 <b>Net short-term capital gain or (loss).</b> Combine lines 1 through 6 in column (f)					7 1.

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

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss) Subtract (e) from (d)
8 0.486 SH AMERICAN CENTURY INVESTMENTS	VARIOUS	05/01/09	13.	0.	13.
0.393 SH AMERICAN CENTURY INVESTMENTS	VARIOUS	11/06/09	13.	0.	13.
9 Enter your long-term totals, if any, from Schedule D-1, line 9			9		
10 <b>Total long-term sales price amounts.</b> Add lines 8 and 9 in column (d)			10	26.	
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824					11
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1					12
13 Capital gain distributions					13
14 Long-term capital loss carryover. Enter the amount, if any, from line 15 of your <b>Capital Loss</b> <b>Carryover Worksheet</b> in the instructions					14 ( )
15 <b>Net long-term capital gain or (loss).</b> Combine lines 8 through 14 in column (f). Then go to Part III on page 2					15 26.

LHA For Paperwork Reduction Act Notice, see Form 1040 or Form 1040NR instructions.

Schedule D (Form 1040) 2009

**Part III Summary**

<p><b>16</b> Combine lines 7 and 15 and enter the result</p>	<b>16</b>	<b>27.</b>
<p>If line 16 is:</p> <ul style="list-style-type: none"> <li>• A <b>gain</b>, enter the amount from line 16 on Form 1040, line 13, or Form 1040NR, line 14. Then go to line 17 below.</li> <li>• A <b>loss</b>, skip lines 17 through 20 below. Then go to line 21. Also be sure to complete line 22.</li> <li>• <b>Zero</b>, 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>		
<p><b>17</b> Are lines 15 and 16 <b>both</b> gains?  <input checked="" type="checkbox"/> <b>Yes.</b> Go to line 18.  <input type="checkbox"/> <b>No.</b> Skip lines 18 through 21, and go to line 22.</p>		
<p><b>18</b> Enter the amount, if any, from line 7 of the <b>28% Rate Gain Worksheet</b> on page D-8 of the instructions</p>	<b>18</b>	
<p><b>19</b> Enter the amount, if any, from line 18 of the <b>Unrecaptured Section 1250 Gain Worksheet</b> on page D-9 of the instructions</p>	<b>19</b>	
<p><b>20</b> Are lines 18 and 19 <b>both</b> zero or blank?  <input checked="" type="checkbox"/> <b>Yes.</b> Complete Form 1040 through line 43, or Form 1040NR through line 40. Then complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> on page 39 of the Instructions for Form 1040 (or in the Instructions for Form 1040NR). <b>Do not</b> complete lines 21 and 22 below.  <input type="checkbox"/> <b>No.</b> Complete Form 1040 through line 43, or Form 1040NR through line 40. Then complete the <b>Schedule D Tax Worksheet</b> on page D-10 of the instructions. <b>Do not</b> complete lines 21 and 22 below.</p>		
<p><b>21</b> If line 16 is a loss, enter here and on Form 1040, line 13, or Form 1040NR, line 14, the <b>smaller</b> of:</p> <ul style="list-style-type: none"> <li>• The loss on line 16 or</li> <li>• (\$3,000), or if married filing separately, (\$1,500)</li> </ul>	<b>21</b>	
<p><b>Note.</b> When figuring which amount is smaller, treat both amounts as positive numbers.</p>		
<p><b>22</b> Do you have qualified dividends on Form 1040, line 9b, or Form 1040NR, line 10b?  <input type="checkbox"/> <b>Yes.</b> Complete Form 1040 through line 43, or Form 1040NR through line 40. Then complete the <b>Qualified Dividends and Capital Gain Tax Worksheet</b> on page 39 of the Instructions for Form 1040 (or in the Instructions for Form 1040NR).  <input type="checkbox"/> <b>No.</b> Complete the rest of Form 1040 or Form 1040NR.</p>		

**SCHEDULE E**

**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041.

▶ See Instructions for Schedule E (Form 1040).

OMB No. 1545-0074

**2009**

Attachment  
Sequence No. **13**

Name(s) shown on return

Your social security number

**TIMOTHY M. KAINE & ANNE B. HOLTON**

**Part I Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use Schedule C or C-EZ (see page E-3). If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

1 List the type and address of each rental real estate property:		2 For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:		Yes	No
A	RESIDENTIAL PROPERTY [REDACTED], RICHMOND, VA - 85.2	• 14 days or	• 10% of the total days rented at fair rental value? (See page E-3)		X
B					
C					

		Properties			Totals
		A	B	C	(Add columns A, B, and C.)
3 Rents received	3	12,325.			3 12,325.
4 Royalties received	4				4
<b>Expenses:</b>					
5 Advertising	5				
6 Auto and travel (see page E-4)	6				
7 Cleaning and maintenance	7	1,559.			
8 Commissions	8	378.			
9 Insurance	9	759.			
10 Legal and other professional fees	10				
11 Management fees	11				
12 Mortgage interest paid to banks, etc. (see page E-5)	12	4,745.			12 4,745.
13 Other interest	13				
14 Repairs	14	5,224.			
15 Supplies	15				
16 Taxes	16	3,671.			
17 Utilities	17	1,581.			
18 Other (list) ▶	18				
19 Add lines 5 through 18	19	17,917.			19 17,917.
20 Depreciation expense or depletion (see page E-5)	20	3,458.			20 3,458.
21 Total expenses. Add lines 19 and 20	21	21,375.			
22 Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-5 to find out if you must file Form 6198	22	<9,050.>			
23 Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-5 to find out if you must file Form 8582. Real estate professionals must complete line 43 on page 2	23	0.)			
24 Income. Add positive amounts shown on line 22. Do not include any losses	24				24 0.
25 Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here	25				25 ( 0.)
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26				26 0.

## Statement of Rental and Royalty Income

Name(s) as shown on return: **TIMOTHY M. KAINE & ANNE B. HOLTON**      Your social security number: 

Kind: **RESIDENTIAL PROPERTY**      Location: **85.210% [redacted] RICHMOND, VA -**

		GROSS	PERSONAL/DUAL OWNERSHIP EXCLUSION	VACATION HOME LOSS LIMITATION	NET TO SCH E
<b>Rental and Royalty Income</b>					
3. Rents received .....	3	12,325.			12,325.
4. Royalties received .....	4				
<b>Rental and Royalty Expenses</b>					
5. Advertising .....	5				
6. Auto and travel .....	6				
7. Cleaning and maintenance .....	7	1,559.			1,559.
8. Commissions .....	8	378.			378.
9. Insurance .....	9	1,253.	494.		759.
10. Legal and other professional fees .....	10				
11. Management fees .....	11				
12. Mortgage interest paid to banks, etc. ....	12	5,569.	824.		4,745.
13. Other interest .....	13				
14. Repairs .....	14	5,224.			5,224.
15. Supplies .....	15				
16. Taxes .....	16	4,308.	637.		3,671.
17. Utilities .....	17	1,581.			1,581.
18. Other (list) ▶ _____	18				
19. Add lines 5 through 18 .....	19	19,872.	1,955.		17,917.
20. Depreciation expense or depletion .....	20	4,058.	600.		3,458.
21. Total expenses. Add lines 19 and 20 .....	21	23,930.	2,555.		21,375.
22. Income or (loss) from rental or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties) .....	22	<11,605.>			<9,050.>



# Passive Activity Loss Limitations

Department of the Treasury  
Internal Revenue Service (99)

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

Name(s) shown on return

Identifying number

**TIMOTHY M. KAINE & ANNE B. HOLTON**

**Part I 2009 Passive Activity Loss** Caution: Complete Worksheets 1, 2, and 3 on page 2 before completing Part I.

**Rental Real Estate Activities With Active Participation** (For the definition of active participation, see Special Allowance for Rental Real Estate Activities on page 3 of the instructions.)

1a	Activities with net income (enter the amount from Worksheet 1, column (a))		
1b	Activities with net loss (enter the amount from Worksheet 1, column (b))	<9,050.>	
1c	Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	<16,425.>	
1d	Combine lines 1a, 1b, and 1c		<25,475.>

**Commercial Revitalization Deductions From Rental Real Estate Activities**

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

**All Other Passive Activities**

3a	Activities with net income (enter the amount from Worksheet 3, column (a))		
3b	Activities with net loss (enter the amount from Worksheet 3, column (b))		
3c	Prior years unallowed losses (enter the amount from Worksheet 3, column (c))		
3d	Combine lines 3a, 3b, and 3c		

4	Combine lines 1d, 2c, and 3d. If the result is net income or zero, all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Do not complete Form 8582. Report the losses on the forms and schedules normally used		<25,475.>
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- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
  - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
  - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

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

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

Note: Enter all numbers in Part II as positive amounts. See page 8 of the instructions for an example.

5	Enter the smaller of the loss on line 1d or the loss on line 4		25,475.
6	Enter \$150,000. If married filing separately, see the instructions	150,000.	
7	Enter modified adjusted gross income, but not less than zero (see the instr.)	175,955.	STATEMENT 7
8	Subtract line 7 from line 6		
9	Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see the instructions		
10	Enter the smaller of line 5 or line 9		0.

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

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

Note: Enter all numbers in Part III as positive amounts. See the example for Part II on page 8 of the instructions.

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

**Part IV Total Losses Allowed**

15	Add the income, if any, on lines 1a and 3a and enter the total		
16	Total losses allowed from all passive activities for 2009. Add lines 10, 14, and 15. See the instructions to find out how to report the losses on your tax return	SEE STATEMENT 6	0.

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 1					
Total. Enter on Form 8582, lines 1a, 1b, and 1c		<9,050.>	<16,425.>		

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

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
Total. Enter on Form 8582, lines 3a, 3b, and 3c					

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

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

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

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 5				
Total		25,475.	1.000000000	25,475.

**Worksheet 6 - Allowed Losses** (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
	SEE ATTACHED STATEMENT FOR WORKSHEET 6			
<b>Total</b>		25,475.	25,475.	

**Worksheet 7 - Activities With Losses Reported on Two or More Forms or Schedules** (See instructions.)

Name of activity:	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Total</b>					

ALTERNATIVE MINIMUM TAX  
**Passive Activity Loss Limitations**

Department of the Treasury  
Internal Revenue Service (99)

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

Name(s) shown on return

Identifying number

**TIMOTHY M. KAINÉ & ANNE B. HOLTON**

**Part I 2009 Passive Activity Loss** Caution: Complete Worksheets 1, 2, and 3 on page 2 before completing Part I.

**Rental Real Estate Activities With Active Participation** (For the definition of active participation, see Special Allowance for Rental Real Estate Activities on page 3 of the instructions.)

1a	Activities with net income (enter the amount from Worksheet 1, column (a))		
1b	Activities with net loss (enter the amount from Worksheet 1, column (b))	<9,050.>	
1c	Prior years unallowed losses (enter the amount from Worksheet 1, column (c))	<16,425.>	
1d	Combine lines 1a, 1b, and 1c		<25,475.>

**Commercial Revitalization Deductions From Rental Real Estate Activities**

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

**All Other Passive Activities**

3a	Activities with net income (enter the amount from Worksheet 3, column (a))		
3b	Activities with net loss (enter the amount from Worksheet 3, column (b))		
3c	Prior years unallowed losses (enter the amount from Worksheet 3, column (c))		
3d	Combine lines 3a, 3b, and 3c		

4	Combine lines 1d, 2c, and 3d. If the result is net income or zero, all losses are allowed, including any prior year unallowed losses entered on line 1c, 2b, or 3c. Do not complete Form 8582. Report the losses on the forms and schedules normally used		<25,475.>
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- If line 4 is a loss and:
- Line 1d is a loss, go to Part II.
  - Line 2c is a loss (and line 1d is zero or more), skip Part II and go to Part III.
  - Line 3d is a loss (and lines 1d and 2c are zero or more), skip Parts II and III and go to line 15.

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

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

Note: Enter all numbers in Part II as positive amounts. See page 8 of the instructions for an example.

5	Enter the smaller of the loss on line 1d or the loss on line 4		25,475.
6	Enter \$150,000. If married filing separately, see the instructions	150,000.	
7	Enter modified adjusted gross income, but not less than zero (see the instr.)	175,955.	
8	Subtract line 7 from line 6		
9	Multiply line 8 by 50% (.5). Do not enter more than \$25,000. If married filing separately, see the instructions		
10	Enter the smaller of line 5 or line 9		0.

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

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

Note: Enter all numbers in Part III as positive amounts. See the example for Part II on page 8 of the instructions.

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

**Part IV Total Losses Allowed**

15	Add the income, if any, on lines 1a and 3a and enter the total		
16	Total losses allowed from all passive activities for 2009. Add lines 10, 14, and 15. See the instructions to find out how to report the losses on your tax return	SEE STATEMENT 11	0.

**ALTERNATIVE MINIMUM TAX**

Form 8582 (2009) **TIMOTHY M. KAINE & ANNE B. HOLTON**

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 1a)	(b) Net loss (line 1b)	(c) Unallowed loss (line 1c)	(d) Gain	(e) Loss
SEE ATTACHED STATEMENT FOR WORKSHEET 1					
<b>Total.</b> Enter on Form 8582, lines 1a, 1b, and 1c		<9,050.>	<16,425.>		

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

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

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

Name of activity	Current year		Prior years	Overall gain or loss	
	(a) Net income (line 3a)	(b) Net loss (line 3b)	(c) Unallowed loss (line 3c)	(d) Gain	(e) Loss
<b>Total.</b> Enter on Form 8582, lines 3a, 3b, and 3c					

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

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

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

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Ratio	(c) Unallowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 5				
<b>Total</b>		25,475.	1.000000000	25,475.

ALTERNATIVE MINIMUM TAX

Form 8582 (2009) TIMOTHY M. KAINE & ANNE B. HOLTON

Worksheet 6 - Allowed Losses (See instructions.)

Name of activity	Form or schedule and line number to be reported on (see instructions)	(a) Loss	(b) Unallowed loss	(c) Allowed loss
SEE ATTACHED STATEMENT FOR WORKSHEET 6				
<b>Total</b>		25,475.	25,475.	

Worksheet 7 - Activities With Losses Reported on Two or More Forms or Schedules (See instructions.)

Name of activity:	(a)	(b)	(c) Ratio	(d) Unallowed loss	(e) Allowed loss
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Form or schedule and line number to be reported on (see instructions):</b>					
<b>1a</b> Net loss plus prior year unallowed loss from form or schedule					
<b>b</b> Net income from form or schedule					
<b>c</b> Subtract line 1b from line 1a. If zero or less, enter -0-					
<b>Total</b>					

**SCHEDULE M**  
**(Form 1040A or 1040)**

**Making Work Pay and Government Retiree Credits**

OMB No. 1545-0074

**2009**

Attachment Sequence No. **166**

Department of the Treasury  
Internal Revenue Service (99)

▶ **Attach to Form 1040A, 1040, or 1040NR.**

▶ **See separate instructions.**

Name(s) shown on return

Your social security number

**TIMOTHY M. KAINE & ANNE B. HOLTON**

[REDACTED]

**1a Important:** See the instructions if you can be claimed as someone else's dependent or are filing Form 1040NR. Check the "No" box below and see instructions if (a) you have a net loss from a business, (b) you received a taxable scholarship or fellowship grant not reported on a Form W-2, (c) your wages include pay for work performed while an inmate in a penal institution, (d) you received a pension or annuity from a nonqualified deferred compensation plan or a nongovernmental section 457 plan, or (e) you are filing Form 2555 or 2555-EZ.

Do you (and your spouse if filing jointly) have 2009 wages of more than \$6,451 (\$12,903 if married filing jointly)?

**Yes.** Skip lines 1a through 3. Enter \$400 (\$800 if married filing jointly) on line 4 and go to line 5.

**No.** Enter your earned income (see instructions) ..... **1a**

**b** Nontaxable combat pay included on line 1a (see instructions) ..... **1b**

**2** Multiply line 1a by 6.2% (.062) ..... **2**

**3** Enter \$400 (\$800 if married filing jointly) ..... **3**

**4** Enter the **smaller** of line 2 or line 3 (unless you checked "Yes" on line 1a) ..... **4** **800.**

**5** Enter the amount from Form 1040, line 38\*, or Form 1040A, line 22 ..... **5** **175,955.**

**6** Enter \$75,000 (\$150,000 if married filing jointly) ..... **6** **150,000.**

**7** Is the amount on line 5 more than the amount on line 6?

**No.** Skip line 8. Enter the amount from line 4 on line 9 below.

**Yes.** Subtract line 6 from line 5 ..... **7** **25,955.**

**8** Multiply line 7 by 2% (.02) ..... **8** **519.**

**9** Subtract line 8 from line 4. If zero or less, enter -0- ..... **9** **281.**

**10** Did you (or your spouse, if filing jointly) receive an economic recovery payment in 2009? You may have received this payment if you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits (see instructions).

**No.** Enter -0- on line 10 and go to line 11.

**Yes.** Enter the total of the payments received by you (and your spouse, if filing jointly). Do not enter more than \$250 (\$500 if married filing jointly) ..... **10** **0.**

**11** Did you (or your spouse, if filing jointly) receive a pension or annuity in 2009 for services performed as an employee of the U.S. Government or any U.S. state or local government from work **not** covered by social security? Do not include any pension or annuity reported on Form W-2.

**No.** Enter -0- on line 11 and go to line 12.

**Yes.**

- If you checked "No" on line 10, enter \$250 (\$500 if married filing jointly and the answer on line 11 is "Yes" for both spouses)
- If you checked "Yes" on line 10, enter -0- (exception: enter \$250 if filing jointly and the spouse who received the pension or annuity did not receive an economic recovery payment described on line 10)

..... **11** **0.**

**12** Add lines 10 and 11 ..... **12** **0.**

**13** Subtract line 12 from line 9. If zero or less, enter -0- ..... **13** **281.**

**14** **Making work pay and government retiree credits.** Add lines 11 and 13. Enter the result here and on Form 1040, line 63; Form 1040A, line 40; or Form 1040NR, line 60 ..... **14** **281.**

\*If you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico, see instructions.



FORM 1040 QUALIFIED DIVIDENDS STATEMENT 1

NAME OF PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS
AMERICAN CENTURY INVESTMENTS GENERAL ELECTRIC CO	35. 1,043.	35. 1,043.
TOTAL INCLUDED IN FORM 1040, LINE 9B		1,078.

SCHEDULE A MORTGAGE INTEREST AND POINTS REPORTED ON FORM 1098 STATEMENT 2

DESCRIPTION	AMOUNT
HOME MORTGAGE INTEREST PAID TO A FINANCIAL INSTITUTION RESIDENTIAL PROPERTY - [REDACTED], RICHMOND, VA	824.
TOTAL TO SCHEDULE A, LINE 10	824.

FORM 8582 ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1 STATEMENT 3

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
RESIDENTIAL PROPERTY - [REDACTED] [REDACTED] RICHMOND, VA	0.	<9,050.>	<16,425.>		<25,475.>
TOTALS	0.	<9,050.>	<16,425.>		<25,475.>

FORM 8582 ALLOCATION OF UNALLOWED LOSSES - WORKSHEET 5 STATEMENT 4

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
RESIDENTIAL PROPERTY - [REDACTED] [REDACTED], RICHMOND, VA	SCH E	25,475.	1.000000000	25,475.
TOTALS		25,475.	1.000000000	25,475.





FORM 8582

ALLOWED LOSSES - WORKSHEET 6

STATEMENT 5

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
RESIDENTIAL PROPERTY -  RICHMOND, VA	SCH E	25,475.	25,475.	
TOTALS		25,475.	25,475.	

FORM 8582

SUMMARY OF PASSIVE ACTIVITIES

STATEMENT 6

R R E A NAME	FORM OR SCHEDULE	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
X RESIDENTIAL PROPERTY -	SCH E	<9,050.>	<16,425.>	<25,475.>	25,475.
TOTALS		<9,050.>	<16,425.>	<25,475.>	25,475.

PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME

TOTAL TO FORM 8582, LINE 16

FORM 8582

MODIFIED AGI

STATEMENT 7

INCOME

WAGES, SALARIES, TIPS ETC.		
DIVIDEND INCOME		174,100.
TAXABLE REFUNDS		1,078.
ALIMONY RECEIVED		164.
TAXABLE IRA DISTRIBUTIONS		
TAXABLE PENSIONS AND ANNUITIES		
UNEMPLOYMENT COMPENSATION		
OTHER INCOME		

INTEREST INCOME	586.	
ADD: SERIES EE AND I EXCLUSION		

BUSINESS INCOME OR LOSS		586.
ADD: PASSIVE LOSSES		
SUBTRACT: PASSIVE INCOME		

SALE OF ASSETS	27.	
ADD: PASSIVE/RREA PROFESSIONAL LOSSES		
SUBTRACT: PASSIVE INCOME		

RENTAL, ROYALTY OR PASSTHROUGH INCOME OR LOSS		27.
ADD: PASSIVE/RREA PROFESSIONAL LOSSES		
SUBTRACT: PASSIVE INCOME		

FARM OR FARM RENTAL INCOME OR LOSS		
ADD: PASSIVE/RREA PROFESSIONAL LOSSES		
SUBTRACT: PASSIVE INCOME		

TOTAL INCOME		175,955.
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ADJUSTMENTS

MOVING EXPENSES		
SELF-EMPLOYED HEALTH INSURANCE DEDUCTION		
PENALTY ON EARLY WITHDRAWAL OF SAVINGS		
ALIMONY PAID		
KEOGH/SEP DEDUCTION		
OTHER ADJUSTMENTS		

TOTAL ADJUSTMENTS		
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TOTAL TO FORM 8582, LINE 7		175,955.
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FORM 8582

ALTERNATIVE MINIMUM TAX  
ACTIVE RENTAL OF REAL ESTATE - WORKSHEET 1

STATEMENT 8

NAME OF ACTIVITY	CURRENT YEAR		PRIOR YEAR UNALLOWED LOSS	OVERALL GAIN OR LOSS	
	NET INCOME	NET LOSS		GAIN	LOSS
RESIDENTIAL PROPERTY - [REDACTED] RICHMOND, VA	0.	<9,050.>	<16,425.>		<25,475.>
TOTALS	0.	<9,050.>	<16,425.>		<25,475.>

FORM 8582

ALTERNATIVE MINIMUM TAX  
ALLOCATION OF UNALLOWED LOSSES - WORKSHEET 5

STATEMENT 9

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	RATIO	UNALLOWED LOSS
RESIDENTIAL PROPERTY - [REDACTED] RICHMOND, VA	SCH E	25,475.	1.000000000	25,475.
TOTALS		25,475.	1.000000000	25,475.

FORM 8582

ALTERNATIVE MINIMUM TAX  
ALLOWED LOSSES - WORKSHEET 6

STATEMENT 10

NAME OF ACTIVITY	FORM OR SCHEDULE	LOSS	UNALLOWED LOSS	ALLOWED LOSS
RESIDENTIAL PROPERTY - [REDACTED] [REDACTED] RICHMOND, VA	SCH E	25,475.	25,475.	
TOTALS		25,475.	25,475.	



FORM 8582AMT

SUMMARY OF PASSIVE ACTIVITIES - AMT

STATEMENT 11

R R E A NAME	FORM OR SCHEDULE	GAIN/LOSS	PRIOR YEAR C/O	NET GAIN/LOSS	UNALLOWED LOSS	ALLOWED LOSS
X RESIDENTIAL PROPERTY -	SCH E	<9,050.>	<16,425.>	<25,475.>	25,475.	
TOTALS		<9,050.>	<16,425.>	<25,475.>	25,475.	
PRIOR YEAR CARRYOVERS ALLOWED DUE TO CURRENT YEAR NET ACTIVITY INCOME						
TOTAL TO FORM 8582AMT, LINE 16						