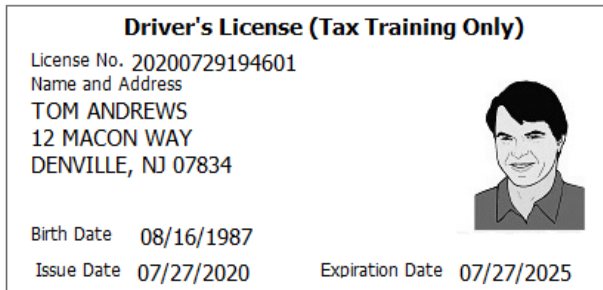
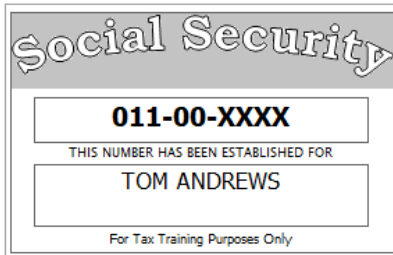


## EX-01 Andrews Scenario



### Other Information:

- Tom paid \$745 in medical expenses for dental work.
- Tom donated \$100 to United Fund
- Tom paid \$300/ month rent for the entire year
- Tom contributed \$500 to a Roth IRA

### Step 0

Complete Basic Information section of TaxSlayer using information from the Intake/Interview & Quality Review Sheet.

**Note:** Be sure the last 4 digits of the SSN are different than the one used last year and advise new recruits that there may be other returns in TY 2019 with the same name.

### New Jersey Return

Answer "NO" to the "Do you meet Property Tax Credit or Deduction Eligibility Requirements?"

Answer "Yes" for the health insurance question.


Stop the NJ return at this point by selecting "Continue" We will come back to NJ later.

### Dependents

Answer the question "No"

## EX-01 Andrews Scenario

### Step 1: W-2 Marc Tecktronics

a. Employee's social security number 011-00-XXXX		Save. accurate, FAST! Use				Visit the IRS website at www.irs.gov/efile	
OMB No. 1545-0008							
b. Employer identification number (EIN) 13-0000752		1. Wages, tips, other compensation \$29,657.00		2. Federal income tax withheld \$2,500.00			
c. Employer's name, address, and ZIP code  MARC TECKTRONICS PO BOX 717 CHARLOTTE, NC 28202		3. Social security wages \$29,657.00		4. Social security tax withheld \$1,838.73			
		5. Medicare wages and tips \$29,657.00		6. Medicare tax withheld \$430.03			
		7. Social security tips		8. Allocated tips			
d. Control number		9.		10. Dependant care benefits			
e. Employee's first name and initial Last name                      Suff. Employee's address and ZIP code  TOM ANDREWS 12 MACON WAY DENVER, NJ 07834		11. Nonqualified plans		12a. See instructions for box 12 DD                      \$4,300.00			
		13. Statutory      Retirement      Third-party Employee      Plan                      sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b.			
		14. Other NJSUI    126.04		12c.			
		NJDI    50.42		12d.			
NJFLI    23.73							
15. State NJ	Employer's state ID number 130000752	16. State wages, tips, etc. \$29,657.00	17. State income tax 765.00	18. Local wages, tips, etc.	19. Local income tax	20. Locality name	
Form <b>W-2</b> Wage and Tax Statement <b>2019</b> Copy B - To Be Filed With Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service.							

**Federal AGI: 29,657**

**Federal Refund: 597**

**NJ Refund Amount: 333**

### Step 2: Unemployment Compensation

**Federal AGI: 30,332**

**Federal Refund: 589**

**NJ Refund Amount: 333**

## EX-01 Andrews Scenario

### Step 3: Interest – Nations Bank

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name Street address City or town, state or province, country, ZIP or foreign postal code Telephone no.  <b>NATIONS BANK</b> 1125 S 12TH ST PHILADELPHIA, PA 19102		Payer's RTN (optional)  1 Interest income	OMB No. 1545-0112  <h1 style="margin: 0;">2019</h1> Form 1099-INT		<b>Interest Income</b>
PAYER'S TIN 13-9000752		RECIPIENT'S TIN 011-00-XXXX		<b>Copy B</b>  <b>For Recipient</b>  This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported	
RECIPIENT'S name Street address (including apt.no.) City or town, state or province, country, ZIP or foreign postal code  <b>TOM ANDREWS</b> 12 MACON WAY DENVILLE, NJ 07834		2 Early withdrawal penalty  3 Interest on US Savings Bonds and Treas. obligations \$342.00	4 Federal income tax withheld  6 Foreign Tax Paid  8 Tax exempt interest  10 Market Discount  12 Bond premium on Treasury obligations	5 Investment expenses  7 Foreign Country or US possession  9 Specified private activity bond interest  11 Bond Premium  13 Bond Premium on tax-exempt bond	
Account number (see instructions)		FATCA filing requirement <input type="checkbox"/>		14 Tax-exempt and tax credit bond CUSIP no.  15 State -----	16 State Identification no. -----
17 State tax withheld -----					
Form <b>1099-INT</b>					

**Federal AGI: 30,674**

**Federal Refund: 547**

**NJ Refund Amount: 333**

### Step 4: NJ Tax Refund

**Federal AGI: 30,674**

**Federal Refund: 547**

**NJ Refund Amount: 333**

**EX-01 Andrews Scenario**

**Step 5: Student Loan Interest – People Federal Bank**

<input type="checkbox"/> CORRECTED (if checked)			
RECIPIENT'S/LENDER'S name Street address City or town, state or province, country, ZIP or Foreign Postal Code Telephone number  PEOPLES FEDERAL BANK PO BOX 54321 SAN DIEGO, CA 92109		OMB. 1545-1576  <b>2019</b>  Form 1098-E	<b>Student Loan Interest Statement</b>
RECIPIENT'S federal identification no. 13-6000752	BORROWER'S social security number 011-00-XXXX	1 Student loan interest received by lender \$650.00	<b>Copy B For Borrower</b>
BORROWER'S name Street address (including apt. no.) City or town, state or province, country, ZIP or Foreign Postal Code  TOM ANDREWS 12 MACON WAY DENVILLE, NJ 07834		This important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for student loan interest.	
Account number (see instructions)		2 If checked box 1 does not include loan origination fees and/or capitalized interest for loans made before September, 1 2004. . . . . <input type="checkbox"/>	
Form 1098-E			

**Federal AGI: 30,024      Federal Refund: 625      NJ Refund Amount: 333**

**Step 6: Traditional IRA Contribution Adjustment**

**Enter the IRA Contribution Adjustment**

**Federal AGI: 28,824      Federal Refund: 889      NJ Refund Amount: 333**

**Step 7: Roth IRA Contribution Retirement Savings Credit Form 8880**

**Enter the Roth IRA Contribution to Form 8880**

**Federal AGI: 28,824      Federal Refund: 939      NJ Refund Amount: 333**

**Step 8: Itemized Deductions Schedule A - Medical**

**Federal AGI: 28,824      Federal Refund: 939      NJ Refund Amount: 336**

**EX-01 Andrews Scenario**

**Step 9: Retirement Savings Credit Form 8880**

Enter on Form 8880 any distributions taken as described in the 4012 page G-15 &16.

Federal AGI: 28,824

Federal Refund: 939,

NJ Refund Amount: 336

**Step 10: Health Insurance (Federal)**

Federal AGI: 28,824

Federal Refund: 939

NJ Refund Amount: 336

**Step 11: NJ Return**

**Step 11A: NJ Property Tax Credit or Deduction – NJ**

**Step 11B: NJ Health Insurance**

**Step 11C: NJ Basic Information**

Federal AGI: 28,824

Federal Refund: 939

NJ Refund Amount: 491

**Step 12: E-File**

Federal AGI: 28,824

Federal Refund: 939

NJ Refund Amount: 491