

**NJ Updates to Workbook
Focused Exercises
Investment Income (Ronald Davis)**

Intake Sheet:

- Part 1 Line 3 City is Denville, NJ 07834
- Alicia Davis Died January 5, 2019

1099-R Duvall County School District

- EIN = 843000752

1099-DIV Grant Investment Services – Exempt Interest Dividends -\$619.37

	NJ Fidelity Fund	Fidelity Muni
Split between funds	\$340.65	\$278.72
NJ Turnpike Bonds	91%	10%
Mass. Turnpike Bonds	9%	
Puerto Rico Infrastructure Bonds		18%
Arizona State Bonds		72%

Other Information

- All dates shown as 2020 should be changed to 2019.
- Ronald paid \$10,000 in property taxes for the year. Block 5 lot 10 This includes his homestead benefit.
- Ronald also received \$250 veteran's property tax credit
- Ronald had no out of pocket medical expenses
- Ronald is a Veteran
- Ronald does not want to contribute to the Presidential Election Campaign Fund
- Ronald would like his NJ Gubernatorial Election Campaign Fund contribution to be the same as his federal.
- If Ronald is due a refund on his Federal and/or NJ return he would like to receive a check
- If Ronald owes on his Federal and/or New Jersey return he will pay by check.