

**NJ Updates to Workbook**  
**Focused Exercises**  
**Itemized Deductions and Education Benefits (Mary Elliott)**

Intake Sheet:

- Part 1 Line 3 City is Denville, NJ 07834
- Information regarding Mary's daughter Amy should be taken from the Focused Exercises Instructions and the Focused Exercises Intake and Interview sheet. **Change Amy's birthdate to 5/4/1998.**

W-2 Cinnamon Quilt Shoppe

- EIN = 468000752
- Box 14:
  - NJ SUI: 146.20
  - NJ DI: 65.34
  - NJFLI: 30.96
- Box 15: NJ 468000752000
- Box 16: 51,000

Other Information

- Mary owns her own home and pays property tax. Block 5, Lot 10
- Mary did not receive a Homestead Benefit in 2019. Her income was too high in 2016.
- Upon questioning Mary regarding personal property tax, she says it is actual property tax on a small piece of land she owns in Florida
- For Sales Tax work sheet use zip code 07834 and 365 days
- Mary is not a Veteran
- Mary does not want to contribute to either the Presidential or Gubernatorial Election Campaign Funds
- Mary contributed \$1000 to an FSA account and used the entire amount in 2019. List of medical expenses do **not** include the amount received from her FSA account.
- Mary's daughter did not receive a 2018 1098-T.
- If Mary is due a refund on her Federal and/or NJ return she would like to have the money direct deposited into her checking account
  - Routing # 021200339 - Account # 54789
- If Mary owes on her Federal and/or New Jersey return she wants the funds to be taken from her checking account.