

# FAM-08 Rosemont Scenario

Form <b>13614-C</b> (Rev. 10-2011)	Department of the Treasury – Internal Revenue Service <b>Intake/Interview &amp; Quality Review Sheet</b>	OMB # 1545-1964
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**Section A. You should complete Pages 1-3**

Thank you for allowing us to prepare your tax return. **You are responsible for the information on your return so please provide complete and accurate information to the certified tax preparer.** If you have any questions please ask your preparer.

**You will need your:**

- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Proof of Identity (such as a valid drivers license or other government issued picture ID).

**Part I. Your Personal Information**

1. Your First Name Helen	M. I. E	Last Name Rosemont	Are you a U.S. Citizen? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2. Spouse's First Name	M. I.	Last Name	Is spouse a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
3. Mailing Address 22 River Road	Apt#	City Medford	State NJ      Zip Code 08055
4. Contact Information Phone: 609-555-7890      Cell Phone:      E-mail:			
5. Your Date of Birth 09/16/1967	6. Your Job Title Hair Stylist	Are you: 8. Totally and Permanently Disabled	7. Legally Blind <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 9. Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> No
9. Spouse's Date of Birth	10. Spouse's Job Title	Is Spouse: 12. Totally and Permanently Disabled	11. Legally Blind <input type="checkbox"/> Yes <input type="checkbox"/> No 10. Yes <input type="checkbox"/> No <input type="checkbox"/> No
13. Can anyone claim you or your spouse on their tax return? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Unsure			

**Part II. Marital Status and Household Information**

1. As of December 31, 2011, were you?  
 Single  
 Married: Did you live with your spouse during any part of the last six months of 2011?  Yes  No  
 Divorced or Legally Separated: Date of final decree or separate maintenance agreement: \_\_\_\_\_  
 Widowed: Year of spouse's death: \_\_\_\_\_

2. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please check here  and list on page 3.

Name (first, last) Do not enter your name or spouse's name below.	Date of Birth (mm/dd/yy)	Relationship to you (e.g. daughter, son, mother, sister, none)	Number of months lived in your home in 2011	US Citizen or resident of the US, Canada or Mexico in 2011 (yes/no)	Marital Status as of 12/31/11 (S/M)	Full-time student in 2011 (yes/no)	Received less than \$3700 income in 2011 (yes/no)
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)

- **Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.**
- To report unethical behavior to IRS, email us at [wi.voltax@irs.gov](mailto:wi.voltax@irs.gov) or call toll free 1-877-330-1205.

**To check the status of your REFUND visit "Where's My Refund?" on [www.irs.gov](http://www.irs.gov) or call 1-800-829-1954 for assistance.**

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**Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.**

## Part III. Income – In 2011, did you (or your spouse) receive:

**Yes No Unsure**

1. Wages or Salary? (Form W-2)
2. Tip Income?
3. Scholarships? (Forms W-2, 1098-T)
4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
5. Refund of state/local income taxes? (Form 1099-G)
6. Alimony Income?
7. Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC)
8. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
9. Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2)
10. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
11. Unemployment Compensation? (Form 1099-G)
12. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
13. Income (or loss) from Rental Property?
14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: \_\_\_\_\_ (Forms W-2 G, 1099-MISC)

## Part IV. Expenses – In 2011 Did you (or your spouse) pay:

**Yes No Unsure**

1. Alimony: If yes, do you have the recipient's SSN?  Yes  No
2. Contributions to a retirement account?  IRA  Roth IRA  401K  Other
3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
4. Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?
5. Medical expenses (including health insurance premiums)?
6. Home mortgage interest? (Form 1098)
7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
8. Charitable contributions?
9. Child/dependent care expenses, such as day-care?

## Part V. Life Events – In 2011 Did you (or your spouse):

**Yes No Unsure**

1. Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)
2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)
3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? \_\_\_\_\_
5. Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?
6. Live in an area that was affected by a natural disaster? If yes, where? \_\_\_\_\_
7. Receive the First Time Homebuyers Credit in 2008?
8. Pay any student loan interest? (Form 1098-E)
9. Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much? \_\_\_\_\_
10. Attend school as a full time student? (Form 1098-T)
11. Adopt a child?
12. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?

**Presidential Election Campaign Fund:** (If you check a box, your tax or refund will not change.)

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund  You  Spouse

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## Additional Information and Questions related to the preparation of your return

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.

Other than English what language is spoken in the home? None

Are you or a member of your household considered disabled?  Yes  No

### If you are due a refund or have a balance due:

- Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days.
- Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of \$50 and earn interest for up to 30 years.

If you are due a refund, would you like a direct deposit?  Yes  No

If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?  Yes  No

If you are due a refund, would you like information on how to split your refund between accounts?  Yes  No

If you have a balance due, would you like to make a payment directly from your bank account?  Yes  No

**Additional comments:**

### **STOP HERE!**

**Thank you for completing this form.**

**Please give this form to the certified volunteer preparer for use in preparing your return.**

**Your Civil Rights are Protected:** It is the Internal Revenue Service's mission to provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all. Under no circumstances will the Internal Revenue Service tolerate discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE shall be excluded from participating in, be denied the benefits of, or be subject to discrimination because of race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by the Department of Treasury – Internal Revenue Service. Any person who believes that he/she has been discriminated against on the basis of race, color, sex, national origin, disability, reprisal or age in programs or activities receiving financial assistance (e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury IRS, may submit a written complaint to: National Headquarters; Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division (External Civil Rights Team); 1111 Constitution Ave., NW Room 2422; Washington, DC 20224.

### **Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

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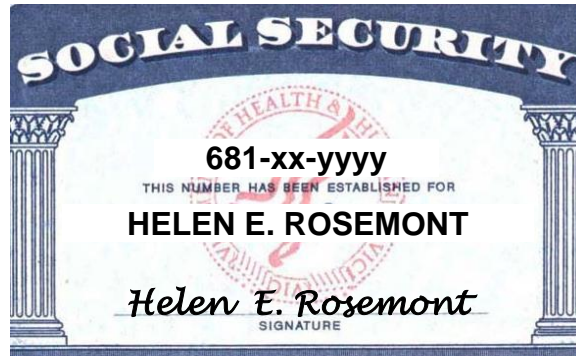
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### Interview Notes:

1. Helen would like to file as Single, but by consulting your preparer resources you determine that the only correct filing status for Helen is Married Filing Separately
2. Helen has not lived with her husband for several years.
3. Helen does not have her prior year return, but tells you that she did not itemize deductions last year.
4. Helen's husband's name is Peter Rosemont. His SSN is 682-xx-yyyy.
5. Peter did not itemize last year nor will he be itemizing this year.
6. Helen rents a home and pays \$875.00/month rent.
7. Helen's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund.
8. By consulting your preparer resources you determine that Medford is located in Burlington County – NJ Code 0320
9. Helen had no out-of-state purchases on which she did not pay Use tax.

### Documents:



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a Employee's social security number <b>681-xx-yyyy</b>		OMB No. 1545-0008		Safe, accurate, FAST! Use				Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>						
b Employer identification number (EIN) <b>68-9xxyyyy</b>			1 Wages, tips, other compensation <b>26,482.00</b>		2 Federal income tax withheld <b>3,972.00</b>									
c Employer's name, address, and ZIP code <b>Hair Do Salon                  90 Main Street                  Medford, NJ 08055</b>			3 Social security wages <b>23,834.00</b>		4 Social security tax withheld <b>1,112.24</b>									
			5 Medicare wages and tips <b>26,482.00</b>		6 Medicare tax withheld <b>383.99</b>									
			7 Social security tips <b>2,648.00</b>		8 Allocated tips									
d Control number			9		10 Dependent care benefits									
e Employee's first name and initial Last name Suff. <b>Helen E. Rosemont                  22 River Road                  Medford, NJ 08055</b>			11 Nonqualified plans		12a See instructions for box 12									
			13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b									
			14 Other NJSDI 132.41 NJSUI 112.55 NJFLI 15.89		12c									
					12d									
f Employee's address and ZIP code			15 State Employer's state ID number NJ   <b>68-9xxyyyy/000</b>		16 State wages, tips, etc. <b>26,482.00</b>		17 State income tax <b>529.84</b>		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

2011

**Form W-2 Wage and Tax Statement**
Department of the Treasury – Internal Revenue Service

Copy B – To Be Filed With Employee's FEDERAL Tax Return.  
 This information is being furnished to the Internal Revenue Service.

<input type="checkbox"/> CORRECTED (if checked)											
PAYER'S name, street address, city, state, ZIP code, and telephone no. <b>New Jersey Department of Labor          PO Box 908          Trenton, NJ 08625</b>				1 Unemployment compensation <b>\$ 3,156.00</b>		<b>2011</b>  Form 1099-G		<b>Certain Government Payments</b>			
				2 State or local income tax refunds, credits, or offsets <b>\$</b>							
PAYER'S federal identification number <b>22-2481818</b>		RECIPIENT'S identification number <b>681-xx-yyyy</b>		3 Box 2 amount is for tax year		4 Federal income tax withheld <b>\$ 315.60</b>		<b>Copy B For Recipient</b>  This is important tax information and is being furnished to the Internal Revenue Service. 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 <b>Helen E. Rosemont</b>  Street address (including apt. no.) <b>22 River Road</b>  City, state, and ZIP code <b>Medford, NJ 08055</b>				5 ATAA/RTAA payments <b>\$</b>		6 Taxable grants <b>\$</b>					
				7 Agriculture payments <b>\$</b>		8 If checked, box 2 is trade or business income <input type="checkbox"/>					
				9 Market gain <b>\$</b>							
Account number (see instructions)				10a State <b>NJ</b>		10b State identification no.		11 State income tax withheld <b>\$</b>			

Form 1099-G (keep for your records) Department of the Treasury - Internal Revenue Service