

PRO-P2 Baylor Review Guide

Intake Sheet, page 4, Section B:

1: No	2: No	3: No	4: Yes – All	5: Yes – All
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E-file created: No longer possible for TY2011

AGI: 52,303

Refund/(Amount owed): 609

Diagnostic:

Overridden Entries: None

Estimated Entries: Dependent on Template used to create return

Form	Payee/Name/Line	Comment/Reference
Main Info	Name line 2	% Ben A Baylor”
	Taxpayer Information	Date of death, Spouse: 6/21/2011
	Filing Status	Married filing jointly
	Dependents	Madison Chambers: Mo in Hm=09; Code=1
1040 Wkt1	Medicare Parts B, C for Taxpayer	Best Practice: 1. enter Part B [1,335] & D [426] on Wkt1 using a scratch pad or 2. enter Part B here, Part D on A Detail
1040 Pg 1	Box above Line 10	No
	Line 21	“GAMBLING WINNINGS”
Sch A	Line 1	Unreimbursed medical and dental expenses: 15,124
	Line 5b	CHECKED, 2223
	Line 6	3949 Best Practice: Scratch pad from 3 rd line with Primary residence real estate taxes and PTR rebate, net 3,326 4 th line: 623 (other than Primary residence) <u>OR</u> Primary residence real estate taxes on 3 rd line: 3,498; Scratch pad from 4 th line with empty lot taxes and PTR rebate, net 451
	Line 28	GAMBLING LOSSES, 1,200
	Line 29	22,138
Sales Tax (NJ)	Line 8	1,400
A Detail	Other medical	Part D: 426 if it was not included on 1040 Wkt1 with a scratch pad.
	Other than cash contributions	Salvation Army: 350
Dividend Stmt	The Lone Star Fund	Capital gain: 737
W-2G	Line 14	120
	Gambling losses	2,550
	Box left of line 13	UNCHECKED
1099-R	Defense Finance & Accounting	State Box 2 CHECKED [Active duty military retirement]
All	TSJ boxes	Blank or correct use of T, S, J

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New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0101
NJ 1040 Pg3	Gubernatorial Fund	Taxpayer: No; Spouse: No
	Line 28 [NJ Gross Income]	0
	Line 30 [Medical Expenses]	15,124
	Line 36a [Total Property Taxes Paid]	3,498 [From Scratch Pad]
	Line 36b [Check here if on October 1, 2010 you were a NJ homeowner]	Checked
	Line 36c [Property Tax Deduction]	0 [From Worksheet F]
	Line 37 [NJ Taxable Income]	0
NJ 1040 Pg4	Line 47 [Total NJ Income Tax Withheld]	120
	Line 48 [Property tax credit]	0 [From Worksheet F]
	Line 65 [Refund]	120
	Worksheet F, Line 1, Property taxes	0 – not filled out per NJ Special Handling
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed
NJ Ret Wkt	Line 10a [. . . receiving Social Security . .]	Yes