

## PRO-P4 Sterling Review Guide

Intake Sheet, page 4, Section B:

|       |                   |       |                   |                   |
|-------|-------------------|-------|-------------------|-------------------|
| 1: No | 2: Yes - Samantha | 3: No | 4: Yes – Samantha | 5: Yes – Samantha |
|-------|-------------------|-------|-------------------|-------------------|

E-file created: No longer possible for TY2011

AGI: 67,984

Refund/(Amount owed): (347)

Diagnostic:

Overridden Entries: None

Estimated Entries: Dependent on Template used to create return

| Form         | Payee/Name/Line                      | Comment/Reference   |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|--------------|--------------------------------------|---|-----------|-----------|-----------|--------|--------|------|--------|-------|--------|-------|------|--------|-------|--------|-------|------|--------|-------|--------|-------|
| Main Info    | Names & SSNs                         | Spouse: Last name blank   |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|              | Taxpayer Information                 | Check if blind / Spouse: Check Yes  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|              | Filing Status                        | 2 Married filing jointly  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|              | Samantha Summers                     | Code = 1  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| 1040 Wkt1    | Medicare Parts B, C                  | Best Practice: enter Part B & D using a scratch pad for both TP and SP  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| Lump Sum Wkt | Entered values                       | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Year</th> <th style="text-align: left;">Line 1, 1</th> <th style="text-align: left;">Line 1, 2</th> <th style="text-align: left;">Line 3</th> <th style="text-align: left;">Line 7</th> </tr> </thead> <tbody> <tr> <td>2008</td> <td>15,972</td> <td>8,085</td> <td>36,391</td> <td>4,126</td> </tr> <tr> <td>2009</td> <td>15,972</td> <td>8,820</td> <td>36,511</td> <td>4,166</td> </tr> <tr> <td>2010</td> <td>15,972</td> <td>8,820</td> <td>36,605</td> <td>4,197</td> </tr> </tbody> </table> | Year      | Line 1, 1 | Line 1, 2 | Line 3 | Line 7 | 2008 | 15,972 | 8,085 | 36,391 | 4,126 | 2009 | 15,972 | 8,820 | 36,511 | 4,166 | 2010 | 15,972 | 8,820 | 36,605 | 4,197 |
|              |                                      | Year  | Line 1, 1 | Line 1, 2 | Line 3    | Line 7 |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|              |                                      | 2008  | 15,972    | 8,085     | 36,391    | 4,126  |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
|              |                                      | 2009  | 15,972    | 8,820     | 36,511    | 4,166  |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| 2010         | 15,972                               | 8,820   | 36,605    | 4,197     |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| Cap Gn Wkt   | 1099 column                          | C   |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| F/S Tax Pd   | NJ state and/or local balance due... | 203   |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| 1099-R       | Averell Pension Fund                 | Simplified Method<br>line 2: 71 or older (optional – has no effect)<br>line 2: annuity starting after 12/31/1997 and combined age 121-130<br>line 5 = 681 (because started receiving in Jan 2008)<br>line 6 = 227 (calculated)  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| 1116         | Included                             | Use 1116 instead of direct entry on 1040, page 2<br>13 in Simplified Limitation Election<br>Remainder of form untouched (e.g. Check only one box... a,b,c,d,e red)  |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |
| All          | TSJ boxes                            | Blank or correct use of T, S, J   |           |           |           |        |        |      |        |       |        |       |      |        |       |        |       |      |        |       |        |       |

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### New Jersey

| <b>Form</b> | <b>Payee/Name/Line</b>                               | <b>Comment/Reference</b>  |
|-------------|--|---|
| NJ 1040 Pg1 | County/Municipality code                             | 1439  |
| NJ 1040 Pg3 | Gubernatorial Fund                                   | Taxpayer: No; Spouse: No  |
|             | Line 28 [NJ Gross Income]                            | 24,202  |
|             | Line 30 [Medical Expenses]                           | 3,906   |
|             | Line 36a [Total Property Taxes Paid]                 | 2268 [From Worksheet F]   |
|             | <b>Line 37 [NJ Taxable Income]</b>                   | <b>14,796</b>   |
|             | Line 44 [Use Tax Due]                                | 22  |
|             | Line 44 [Enter the amount of out-of-state purchases] | 314   |
| NJ 1040 Pg4 | Line 47 [Total NJ Income Tax Withheld]               | 0   |
|             | Line 48 [Property tax credit]                        | 50 [From Worksheet F]   |
|             | <b>Line 55 [Amount you owe]</b>                      | <b>179</b>  |
|             | Worksheet F, Line 1, Rent you paid . . .             | Best Practice: scratch pad with 6 months at \$1,000 and 6 months at \$1,100 |
| NJ DD Wkt   | Direct Debit of Balance Due                          | Check here if you will mail your balance due to New Jersey.                 |