

## PTR-P1 Rime Scenario

### Interview Notes:

1. Pauline T. Rime would like you to prepare her 2012 NJ PTR-2.
2. You are able to verify her SSN (761-xx-yyyy) using her Social Security card and her identity using her driver's license.
3. She has brought her PTR-2 booklet from the state and a copy of her paper 2012 Federal and NJ return. The return was prepared at another site. She has no other tax documents.
4. She has already visited her Tax office and they have filled in the PTR-2A page of the PTR-2 booklet (including Part I).
5. Her basic PTR information has not changed:
  - a. County/Municipality Code: 1801
  - b. Marital Status: Single
  - c. Age/Disability States:
    - i. 65 or older: Yes
    - ii. Disabled: No
  - d. Residency Requirement: She still lives in the same home
  - e. Principal Residence:
    - i. Status: Homeowner
    - ii. Share ownership: No
    - iii. More than one unit: No
6. Her printed returns provide most of the information necessary to fill out the Income Categories part of the PTR. Additional information:
  - a. Bonuses, etc.: No
  - b. Disability Benefits not included elsewhere: No
  - c. Inheritances: \$22,000 (from her deceased husband)
  - d. Bequests and Death Benefits: \$10,000 (from deceased husband's life insurance)