

PTR Income Categories

INCOME CATEGORIES		2012
a. Social Security Benefits (including Medicare Part B premiums) paid to or on behalf of ap	a.	13,000.00
b. Salaries and Wages	b.	-
c. Bonuses, Commissions, and Fees	c.	-
d. Unemployment Benefits	d.	-
e. Disability Benefits, whether public or private (including veterans' and black lung benefi	e.	13,000.00
f. Interest (taxable and exempt)	f.	389.00
g. Dividends	g.	600.00
h. Capital Gains	h.	-
i. Net Rental Income	i.	-
j. Net Profits From Business	j.	400.00
k. Net Distributive Share of Partnership Income	k.	
l. Net Pro Rata Share of S Corporation Income	l.	
m. Support Payments	m.	-
n. Inheritances	n.	21,000.00
o. Royalties	o.	-
p. Gambling and Lottery Winnings (including New Jersey Lottery)	p.	3,000.00
q. Bequests and Death Benefits	q.	10,000.00
r. All Other Income	r.	10.00
s. Add lines a - r above. If amount is > \$82,880 then STOP - You are not eligible	s.	61,399.00
Yes. Continue		
t. Gross Pension and Retirement Benefits (including IRA and annuity income) from Forms	t.	22,000.00
u. Add line s and line t. If amount is < \$82,880 then enter amount on Line 4	u.	83,399.00
No. Continue		
v. New Jersey Pension and Retirement Benefits (including IRA and annuity income). DO N	v.	21,469.00
w. Add line s and line v. If amount is > \$82,880 then STOP - You are not eligible	w.	82,868.00
Yes. Continue		

4. Total 2012 Income

82,868.00

Instructions - Either:

- a) Enter values in cells above, or
 - b) Enter values in 'Values from Tax Return' sheet and above will be calculated
- Note: Use either a) or b), but DO NOT combine

Note: The NJ Division of Taxation has not signed off on this spreadsheet

Values from Tax Return

Federal 1040					PTR
7	Wages, salaries, tips, etc.	13,000.00			
	Portion of line 7 from Disability (if under 65)		13,000.00		e.
	Portion of line 7 from Bonuses		-		c.
	Remainder of line 7		-		b.
9 a	Ordinary dividends	600.00			g.
11	Alimony received	-			m.
12	Business income or (loss)	400.00			j.
13	Capital gain or (loss)	(1,000.00)			h.
15 a	IRA distributions	2,000.00			
	Portion of 15a from Rollovers		-		
	Portion of 15a from Tax-free exchanges, etc.		-		
	Remainder of line 15a		2,000.00		t. & v.
16 a	Pensions and annuities	20,000.00			
	Portion of line 16a from Disability (if under 65)		-		e.
	Remainder of line 16a		20,000.00		t.
16 b	Taxable amount	19,469.00			
	Portion of line 16b from Disability (if under 65)		-		e.
	Remainder of line 16b		19,469.00		v.
17	Rental real estate, royalties, partnerships, S corporations, tr	-			
	Portion of line 17 from Rent		-		i.
	Portion of line 17 from Royalties		-		o.
19	Unemployment compensation	-			d.
20 a	Social security benefits	13,000.00			a.
21	Other income	4,615.00			
	Portion of line 21 from Gambling winnings		4,000.00		
	Gambling losses		1,000.00		
	Net Gambling winnings		3,000.00		p.
	Portion of line 21 from property tax recoveries		605.00		
	Remainder of line 21 not from above		10.00		r.

NJ-1040					PTR
15 a	Taxable interest	189.00			f.
15 b	Tax-exempt interest	200.00			f.
	NJ taxable IRA difference	-			v.
	NJ Roth IRA difference	-			v.

Other					PTR
	Inheritances	21,000.00			n.
	Bequests and Death benefits	10,000.00			q.

Enter value if cell is green

Do NOT enter value if cell is yellow (calculated)

