

LAW-L1 Kent Changes from 4491-W

1. 13614-C: Use filled out PDF Intake Sheet (final instead of draft plus some edits – see below)
2. 13614-C + All Forms - City, ST, Zip: Denville, NJ 07834
3. 13614-C Telephone: 973-555-1234
4. 13614-C Add Cell Phone: 862-555-5678
5. 13614-C Kendra Birthdate: 03-13-1990 (to trigger dependent in college on NJ)
6. 13614-C Order of dependents: Switch Kara & Tamara (to encourage discussion of dependent entry order to be used on Main Info worksheet)
7. **?Maybe?** 13614-C Page 2: Should we add Errors and/or Unsure (to encourage discussion of interview process)
8. Note 8: Remove mention of “other income reported on a K-1” (Not willing to assume K-1 reported stuff from estate not taxable to beneficiary)
9. Line 7, W-2 Jefferson Intermediate School District: Fill in UI / DI / FLI / 414H
10. Line 7, W-2 Americus Petroleum: Fill in DI (with PP#) / UI / FLI
11. Line 8, 1099-INT Gordon Investments: Add text to clarify that tax-exempt interest is tax-exempt for NJ also.
12. Line 9, Dividends: Comment about foreign accounts – move to Notes
13. Line 10, Information from prior year return adjusted (to better illustrate St Tax Refund worksheet calculations)
14. Line 13, 1099-B from Pelrum: Change text to make it clear that commission goes with current tax year sale (instead of original purchase)
15. Line 21, W2-G: Change to NJ Lottery
16. Line 23, Educator Expenses: Lower amount below allowable Adjustment threshold (to avoid excess on Sch A complications)
17. **?Maybe?** Homestead Benefit payment
18. **?Maybe?** PTR
19. **?Maybe?** NJ Estimated payments (pre and post 12/31)

Some other thoughts, but not implemented:

1. **?Not Now?** 13614-C + All Forms: Should we use different SSN prefix and Name (to avoid confusion with official Kent problem)
- 2.