Form 13614-C (Rev. 10-2012) | Department of the Treasury – Internal Revenue Service | OMB # 1545-1964

Intake/Interview & Quality Review Sheet

Section A. Complete Pages 1-3

You are responsible for the information on your return so please provide complete and accurate information to the IRS certified volunteer preparer. If you have any questions please ask your preparer.

You will need your:
- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Picture ID (such as a valid driver's license or other government issued ID for you and your spouse, if applicable).

Part I. Your Personal Information

1. Your First Name: Paula | M. I.: T | Last Name: Roberts | Are you a U.S. Citizen? [x] Yes [ ] No
2. Your Spouse's First Name: | M. I.: | Last Name: | Is your spouse a U.S. Citizen? [ ] Yes [ ] No
3. Mailing Address: 123 Elm | Apt#: | City: Pluckemin | State: NJ | Zip Code: 07978
4. Contact Information
   Phone: 973-555-1111 | Cell Phone: | E-mail:
5. Your Date of Birth: 07-01-1952 | 6. Your Job Title: Glazing Contractor | Are you: 7. Legally Blind [ ] Yes [ ] No; 8. Totally and Permanently Disabled [x] Yes [ ] No
9. Your Spouse's Date of Birth: | 10. Your Spouse's Job Title: | Is Your Spouse: 11. Legally Blind [ ] Yes [ ] No; 12. Totally and Permanently Disabled [ ] Yes [ ] No
13. Can anyone claim you or your spouse on their tax return? [ ] Yes [x] No [ ] Unsure

Part II. Marital Status and Household Information

1. As of December 31, 2012, were you?
   - [x] Single
   - [ ] Married: Did you live with your spouse during any part of the last six months of 2012? [ ] Yes [ ] No
   - [ ] Divorced or Legally Separated: Date of final decree or separate maintenance agreement: __________
   - [ ] Widowed: Year of spouse's death: __________

2. List names below of **everyone** who lived in your home in 2012 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2012. If additional space is needed please check here [ ] and list on page 3.

Name (first, last) Do not enter your name or spouse's name below. (a)	Date of Birth (mm/dd/yy) (b)	Relationship to you (e.g. daughter, son, mother, sister, none) (c)	Number of months lived in your home in 2012 (d)	US Citizen or resident of US, Canada or Mexico in 2012 (yes/no) (e)	Marital Status as of 12/31/12 (S/M) (f)	Full-time Student in 2012 (yes/no) (g)	Received less than $3800 income in 2012 (yes/no) (h)
James Roberts	07-01-89	Son	12	Yes	S	Yes	Yes
Monica Roberts	07-01-93	Daughter	12	Yes	S	Yes	Yes
Lisa Roberts	07-01-93	Daughter	12	Yes	S	Yes	Yes

To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.

To report unethical behavior to IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

N12-P4 Roberts Scenario

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.

Part III. Income – In 2012, did you (or your spouse) receive:

Yes	No	Unsure	
☐	☒	☐	1. Wages or Salary? (Form W-2) If yes, how many jobs did you have in 2012? _____
☐	☒	☐	2. Tip Income?
☒	☐	☐	3. Scholarships? (Forms W-2, 1098-T)
☒	☐	☐	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☒	☐	5. Refund of state/local income taxes? (Form 1099-G)
☐	☒	☐	6. Alimony Income?
☐	☒	☐	7. Self-Employment Income? (Form 1099-MISC)
☒	☐	☐	8. Cash/check payments for any work performed not reported on Forms W-2 or 1099?
☒	☐	☐	9. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
☒	☐	☐	10. Disability Income (such as payments from insurance, or workers compensation)? (Forms 1099-R, W-2)
☒	☐	☐	11. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
☐	☒	☐	12. Unemployment Compensation? (Form 1099-G)
☒	☐	☐	13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☒	☐	14. Income (or loss) from Rental Property?
☒	☐	☐	15. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)? (Forms W-2 G, 1099-MISC) Specify: Gambling, Jury duty

Part IV. Expenses – In 2012 Did you (or your spouse) pay:

Yes	No	Unsure	
☐	☒	☐	1. Alimony: If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☒	☐	2. Contributions to a retirement account? ☐ IRA ☐ Roth IRA ☐ 401K ☐ Other
☒	☐	☐	3. Educational expenses for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
☐	☒	☐	4. Unreimbursed employee business expenses (such as uniforms or mileage)?
☐	☒	☐	5. Medical expenses (including health insurance premiums)?
☐	☒	☐	6. Home mortgage interest? (Form 1098)
☒	☐	☐	7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
☐	☒	☐	8. Charitable contributions?
☐	☒	☐	9. Child or dependent care expenses such as day-care?
☐	☒	☐	10. For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?

Part V. Life Events – In 2012 Did you (or your spouse):

Yes	No	Unsure	
☐	☒	☐	1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)
☐	☒	☐	2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)
☐	☒	☐	3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
☐	☒	☐	4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____
☐	☒	☐	5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
☒	☐	☐	6. Live in an area that was affected by a natural disaster? If yes, where? Pluckemin, NJ
☐	☒	☐	7. Receive the First Time Homebuyers Credit in 2008?
☐	☒	☐	8. Pay any student loan interest? (Form 1098-E)
☐	☒	☐	9. Make estimated tax payments or apply last year's refund to your 2012 tax? If so how much? _____
☐	☒	☐	10. Attend school as a full time student? (Form 1098-T)
☐	☒	☐	11. Adopt a child?
☐	☒	☐	12. File a 2011 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?
☐	☒	☐	13. Become a victim of identity theft?

Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.)
Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☒ You ☐ Spouse

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Additional Information and Questions related to the preparation of your return

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.

Other than English what language is spoken in the home? ______________________

Are you or a member of your household considered disabled? ☐ Yes ☐ No

If you are due a refund or have a balance due:

- Ask your preparer about Direct Deposit. It is the fastest, safest way to receive your tax refund. When you combine e-file and direct deposit, the IRS will likely issue your refund in as few as 10 days.
- Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of $50 and earn interest for up to 30 years.

If you are due a refund, would you like a direct deposit?	☐ Yes	☒ No
If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?	☐ Yes	☒ No
If you are due a refund, would you like information on how to split your refund between accounts?	☐ Yes	☒ No
If you have a balance due, would you like to make a payment directly from your bank account?	☐ Yes	☒ No

Additional comments:

Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. No taxpayer shall be subject to discrimination on the basis of sex, race, color, national origin, reprisal, disability or age in educational programs or activities supported by the Department of the Treasury – Internal Revenue Service.

Taxpayers with a disability may require a reasonable accommodation in order to participate or receive the benefits of a program or activity supported by the Department of the Treasury – Internal Revenue Service. Site Coordinators and Managers are responsible for ensuring that requests for reasonable accommodation are granted when the request is made by a qualified individual with a disability.

If a qualified taxpayer believes that he or she has been discriminated against based on sex, race, color, national origin, disability, reprisal or age, they can file a complaint with the Department of the Treasury – Internal Revenue Service. All written complaints should be sent to:

Director, Civil Rights Division
Internal Revenue Service
1111 Constitution Avenue, NW, Rm. 2413
Washington, DC 20224

For all inquiries concerning taxpayer civil rights, contact us at the address referenced above, or e-mail us at eeo.external.civil.rights@irs.gov.

STOP HERE!
Thank you for completing this form.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

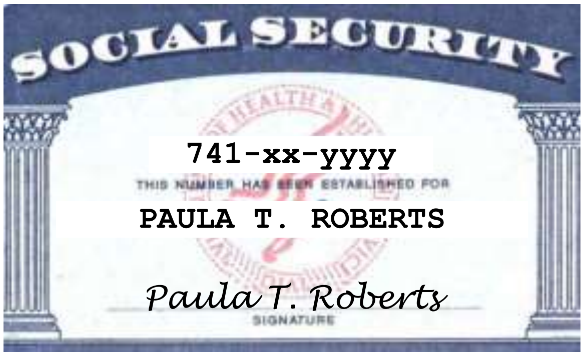
N12-P4 Roberts Scenario

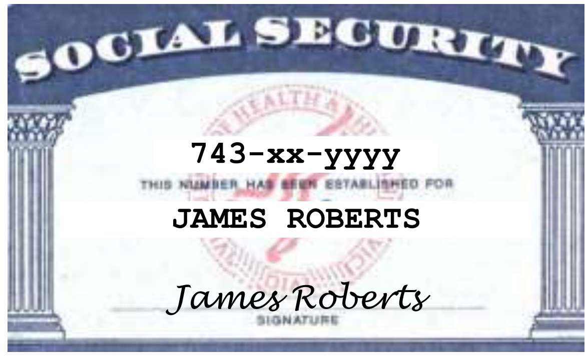
Interview Notes:

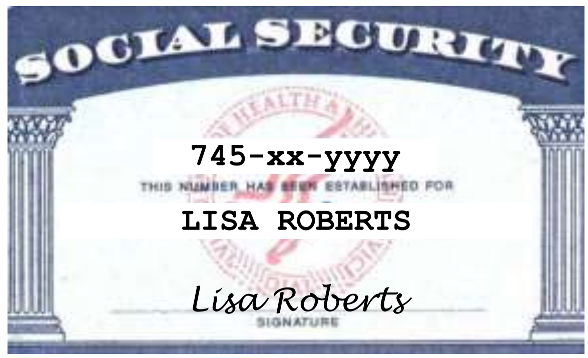
1. Paula brought her prior year return with her. She itemized last year - her itemized deductions were $8,605 and her taxable income was $22,345. She used state sales tax instead of state income tax on Schedule A. She owed $55 on her New Jersey return. There are no capital loss carryovers.
2. Paula is receiving federal Social Security Disability Benefits (reported on her form SSA-1099)
3. One half of the tax exempt interest from Big Bank is for a New Jersey Municipal fund and the other half is for a Municipal fund from another state.
4. Paula is below the minimum retirement age for the company providing her disability pension.
5. Paula does not qualify for the Savings Bond exclusion.
6. Paula received $400 in cash payments during the tax year for various odd jobs as a glazing contractor.
7. Paula has documentation to support $1,000 in gambling losses on slot machines.
8. Paula received $10 for her service on a jury during the tax year.\
9. James is a graduate student at Big U. Monica and Lisa are in their first year at Big U. James had a full scholarship for his 4 year undergraduate degree which he finished prior to 2012. None of the kids have any criminal record.
10. Paula owns her home in Pluckemin (Block Number = 11, Lot Number = 104, no qualifier).
11. She paid $6,000 in property tax ($5,500 out-of-pocket plus a $500 Homestead Benefit credit). The Homestead Benefit, as usual, was for two years ago (Paula did itemize that year).
12. She received a $277 PTR refund during the tax year. Her base year PTR amount is $5,600.
13. Paula does not have a mortgage on her home.
14. Paula had no foreign financial interests or involvement.
15. Paula's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund. Her choice for handling her NJ refund / amount owed is the same as her federal choice.
16. Pluckemin is part of Bedminster township in Somerset county.
17. Paula had no out-of-state purchases on which she did not pay Use tax.
18. Paula received an inheritance of $21,000 and $10,000 death benefit when her mother died last year.
19. She also received an auto insurance payment of $5,000 (based on FMV) when one of her kids totaled her car.
20. Paula had $4,500 of damage to her house during Hurricane Sandy. Her homeowner's insurance only reimbursed her $700.
21. Paula does not have any information on her contributions to her Roth IRA.

N12-P4 Roberts Scenario

Documents:







N12-P4 Roberts Scenario

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2012
- PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
- SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name		Box 2. Beneficiary's Social Security Number
Paula T. Roberts		**741-xx-yyyy**
Box 3. Benefits Paid in 2010	**Box 4. Benefits Repaid to SSA in 2010**	**Box 5. Net Benefits for 2010** *(Box 3 minus Box 4)*
13,000.00	**NONE**	**13,000.00**

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit	11,600.00
Medicare Part B premiums deducted from your benefit	1,400.00
Medicare Prescription Drug premiums (part D) deducted from your Benefits	0.00
Voluntary federal income tax withheld	0.00
Total Additions	13,000.00
Benefits for 2011	13,000.00

DESCRIPTION OF AMOUNT IN BOX 4

NONE

Box 6. Voluntary Federal Income Tax Withheld

0.00

Box 7. Address

Paula T. Roberts
123 Elm
Pluckemin NJ 07978

Box 8. Claim Number *(Use this number if you need to contact SSA.)*

Form **SSA-1099-SM** (1-2011) **DO NOT RETURN THIS FORM TO SSA OR IRS**

Big Bank
123 Main, Pluckemin NJ 07978
EIN: 74-9xxyyyy

Account: 987-020752
Paula T. Roberts
123 Elm, Pluckemin NJ 07978
741-xx-yyyy

Substitute 1099-INT

Box 1	Box 2	Box 3	Box 4	Box 8
Interest income	Early withdrawal penalty	Interest on U.S. Savings Bonds	Federal income tax withheld	Tax-exempt interest
99.00	11.00	101.00		200.00

Substitute 1099-DIV

Box 1a	Box 1b	Box 2a	Box 4	Box 6
Total ordinary dividends	Qualified dividends	Total capital gain distr.	Federal income tax withheld	Foreign tax paid
600.00	122.00			

Substitute 1099-B

Box 1a	Box 1b	Box 1c	Box 1d	Box 1e	Box 2a	Box 3	Box 6
Sale Date	Acquisition Date * = Multiple	Short / Long	Symbol	Quantity	Sale Amount	Cost / Basis	a – Noncovered b – Basis reported
Short-term transactions for which basis **is** reported to the IRS – Report on Form 8949, Part I, with Box A checked.							
07/01/2012	03/01/2012	Short	K	100	5,000.00	5,500.00	b
12/01/2012	*	Short	FB	50	10,000.00	9,000.00	b
Long-term transactions for which basis **is** reported to the IRS – Report on Form 8949, Part II, with Box A checked.							
07/01/2012	08/01/2009	Long	SPDR	50	8,000.00	7,500.00	b
Long-term transactions for which basis **is not** reported to the IRS – Report on Form 8949, Part II, with Box B checked.							
07/01/2012	*	Long	IBM	50	9,000.00	11,000.00	a

N12-P4 Roberts Scenario

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code **Big Bank** **123 Main** **Pluckemin NJ 07978**	1 Gross distribution $ **2,000.00** 2a Taxable amount $	OMB No. 1545-0119 **2012** Form **1099-R**	**Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**
	2b Taxable amount not determined ☐	Total distribution ☐	**Copy B**
PAYER'S federal identification number **74-9xxyyyy** / RECIPIENT'S identification number **74-1xxyyyy**	3 Capital gain (included in box 2a) $	4 Federal income tax withheld $	**Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.**
RECIPIENT'S name **Paula Roberts**	5 Employee contributions /Designated Roth contributions or insurance premiums $	6 Net unrealized appreciation in employer's securities $	
Street address (including apt. no.) **123 Elm**	7 Distribution code(s) **Q** / IRA/ SEP/ SIMPLE ☐	8 Other $ %	This information is being furnished to the Internal Revenue Service.
City, state, and ZIP code **Pluckemin NJ 07978**	9a Your percentage of total distribution %	9b Total employee contributions $	
10 Amount allocable to IRR within 5 years $ / 11 1st year of desig. Roth contrib.	12 State tax withheld $ $	13 State/Payer's state no.	14 State distribution $ $
Account number (see instructions)	15 Local tax withheld $ $	16 Name of locality	17 Local distribution $ $

Form **1099-R** www.irs.gov/form1099r Department of the Treasury - Internal Revenue Service

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code **Big Corp** **123 Main** **Pluckemin NJ 07978**	1 Gross distribution $ **13,000.00** 2a Taxable amount $ **13,000.00**	OMB No. 1545-0119 **2012** Form **1099-R**	**Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**
	2b Taxable amount not determined ☐	Total distribution ☐	**Copy B**
PAYER'S federal identification number **74-8xxyyyy** / RECIPIENT'S identification number **74-1xxyyyy**	3 Capital gain (included in box 2a) $	4 Federal income tax withheld $ **3,000.00**	**Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.**
RECIPIENT'S name **Paula Roberts**	5 Employee contributions /Designated Roth contributions or insurance premiums $	6 Net unrealized appreciation in employer's securities $	
Street address (including apt. no.) **123 Elm**	7 Distribution code(s) **3** / IRA/ SEP/ SIMPLE ☐	8 Other $ %	This information is being furnished to the Internal Revenue Service.
City, state, and ZIP code **Pluckemin NJ 07978**	9a Your percentage of total distribution %	9b Total employee contributions $	
10 Amount allocable to IRR within 5 years $ / 11 1st year of desig. Roth contrib.	12 State tax withheld $ $	13 State/Payer's state no.	14 State distribution $ $
Account number (see instructions)	15 Local tax withheld $ $	16 Name of locality	17 Local distribution $ $

Form **1099-R** www.irs.gov/form1099r Department of the Treasury - Internal Revenue Service

N12-P4 Roberts Scenario

☐ CORRECTED (if checked)

Form 1099-R — Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. OMB No. 1545-0119, 2012

PAYER'S name, street address, city, state, and ZIP code	Big Corp 321 First Ave Pluckemin NJ 07978
1 Gross distribution	$ 20,000.00
2a Taxable amount	$ 19,469.00
2b Taxable amount not determined ☐	Total distribution ☐
PAYER'S federal identification number	74-8xxyyyy
RECIPIENT'S identification number	74-1xxyyyy
3 Capital gain (included in box 2a)	$
4 Federal income tax withheld	$
RECIPIENT'S name	Paula Roberts
5 Employee contributions /Designated Roth contributions or insurance premiums	$
6 Net unrealized appreciation in employer's securities	$
Street address (including apt. no.)	123 Elm
7 Distribution code(s)	7
IRA/SEP/SIMPLE	☐
8 Other	$ %
City, state, and ZIP code	Pluckemin NJ 07978
9a Your percentage of total distribution	%
9b Total employee contributions	$
10 Amount allocable to IRR within 5 years	$
11 1st year of desig. Roth contrib.	
12 State tax withheld	$ / $
13 State/Payer's state no.	
14 State distribution	$ / $
Account number (see instructions)	
15 Local tax withheld	$ / $
16 Name of locality	
17 Local distribution	$ / $

Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.

This information is being furnished to the Internal Revenue Service.

Form 1099-R www.irs.gov/form1099r Department of the Treasury - Internal Revenue Service

☐ CORRECTED (if checked)

Form W-2G — Certain Gambling Winnings OMB No. 1545-0238, 2012

PAYER'S name, address, ZIP code, federal identification number, and telephone number	NJ Lottery 123 Main Pluckemin NJ 07978 EIN: 74-7xxyyyy Tel: 888-555-1111
1 Gross winnings	4,000.00
2 Federal income tax withheld	
3 Type of wager	NJ Lottery
4 Date won	07-01-2012
5 Transaction	
6 Race	
7 Winnings from identical wagers	
8 Cashier	
WINNER'S name, address (including apt. no.), and ZIP code	Paula Roberts 321 Windy Ln Pluckemin NJ 07978
9 Winner's taxpayer identification no.	741-xx-yyyy
10 Window	
11 First I.D.	
12 Second I.D.	
13 State/Payer's state identification no.	
14 State income tax withheld	

This information is being furnished to the Internal Revenue Service.

Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 2, attach this copy to your return.

Under penalties of perjury, I declare that, to the best of my knowledge and belief, the name, address, and taxpayer identification number that I have furnished correctly identify me as the recipient of this payment and any payments from identical wagers, and that no other person is entitled to any part of these payments.

Signature ► Date ►

Form W-2G Department of the Treasury - Internal Revenue Service

N12-P4 Roberts Scenario

☐ CORRECTED

FILER'S name, street address, city, state, ZIP code, and telephone number **Big U** **123 Main** **Pluckemin NJ 07978**	1 Payments received for qualified tuition and related expenses $ **5,000.00** 2 Amounts billed for qualified tuition and related expenses $ **5,000.00**	OMB No. 1545-1574 **2012** Form 1098-T	**Tuition Statement**
FILER'S federal identification no. **74-6xxyyyy** / STUDENT'S social security number **74-3xxyyyy**	3 If this box is checked, your educational institution has changed its reporting method for 2012 ☐		**Copy B For Student**
STUDENT'S name **James Roberts**	4 Adjustments made for a prior year $	5 Scholarships or grants $	This is important tax information and is being furnished to the Internal Revenue Service.
Street address (including apt. no.) **123 Elm** City, state, and ZIP code **Pluckemin NJ 07978**	6 Adjustments to scholarships or grants for a prior year $	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2013 ▶ ☐	
Service Provider/Acct. No. (see instr.) / 8 Check if at least half-time student **X**	9 Checked if a graduate student **X**	10 Ins. contract reimb./refund $	

Form 1098-T (keep for your records) Department of the Treasury - Internal Revenue Service

☐ CORRECTED

FILER'S name, street address, city, state, ZIP code, and telephone number **Big U** **123 Main** **Pluckemin NJ 07978**	1 Payments received for qualified tuition and related expenses $ **4,000.00** 2 Amounts billed for qualified tuition and related expenses $ **4,000.00**	OMB No. 1545-1574 **2012** Form 1098-T	**Tuition Statement**
FILER'S federal identification no. **74-6xxyyyy** / STUDENT'S social security number **74-4xxyyyy**	3 If this box is checked, your educational institution has changed its reporting method for 2012 ☐		**Copy B For Student**
STUDENT'S name **Monica Roberts**	4 Adjustments made for a prior year $	5 Scholarships or grants $	This is important tax information and is being furnished to the Internal Revenue Service.
Street address (including apt. no.) **123 Elm** City, state, and ZIP code **Pluckemin NJ 07978**	6 Adjustments to scholarships or grants for a prior year $	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2013 ▶ ☐	
Service Provider/Acct. No. (see instr.) / 8 Check if at least half-time student **X**	9 Checked if a graduate student ☐	10 Ins. contract reimb./refund $	

Form 1098-T (keep for your records) Department of the Treasury - Internal Revenue Service

☐ CORRECTED

FILER'S name, street address, city, state, ZIP code, and telephone number **Big U** **123 Main** **Pluckemin NJ 07978**	1 Payments received for qualified tuition and related expenses $ **4,000.00** 2 Amounts billed for qualified tuition and related expenses $ **4,000.00**	OMB No. 1545-1574 **2012** Form 1098-T	**Tuition Statement**
FILER'S federal identification no. **74-6xxyyyy** / STUDENT'S social security number **74-5xxyyyy**	3 If this box is checked, your educational institution has changed its reporting method for 2012 ☐		**Copy B For Student**
STUDENT'S name **Lisa Roberts**	4 Adjustments made for a prior year $	5 Scholarships or grants $	This is important tax information and is being furnished to the Internal Revenue Service.
Street address (including apt. no.) **123 Elm** City, state, and ZIP code **Pluckemin NJ 07978**	6 Adjustments to scholarships or grants for a prior year $	7 Checked if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2013 ▶ ☐	
Service Provider/Acct. No. (see instr.) / 8 Check if at least half-time student **X**	9 Checked if a graduate student ☐	10 Ins. contract reimb./refund $	

Form 1098-T (keep for your records) Department of the Treasury - Internal Revenue Service