

FAM-00 Brown Scenario

Interview Notes: (See also: General Notes)

1. George was a full-time student at a local college
2. Mary paid \$144 in Student Loan interest during the tax year
3. The Browns paid \$9,000 in rent while living in Dover through June (They had lived at the Dover address for many years)
4. The Browns moved in July when they inherited a house in Denville. They paid \$4,534 in property taxes, but had no mortgage payments. According to the postcard from the tax office:
– Block=50001, Lot=00002, Qualifier is blank.
5. Henry started receiving his pension from Fidelity this year

social Security

781-00-XXXX

THIS NUMBER HAS BEEN ESTABLISHED FOR

HENRY BROWN

For Tax-Aide Training Purposes Only

social Security

782-00-XXXX

THIS NUMBER HAS BEEN ESTABLISHED FOR

MARY BROWN

For Tax-Aide Training Purposes Only

social Security

783-00-XXXX

THIS NUMBER HAS BEEN ESTABLISHED FOR

GEORGE V BROWN

For Tax-Aide Training Purposes Only

social Security

784-00-XXXX

THIS NUMBER HAS BEEN ESTABLISHED FOR

SUSAN B COX

For Tax-Aide Training Purposes Only

HENRY BROWN MARY BROWN 25 DIAMOND ROAD DENVER, NJ 07834	1234
PAY TO THE ORDER OF _____	\$ _____
_____	DOLLARS
Big Bank Route 10, Denville, NJ 07834	
For _____	
: 325070760 : 987123654 1234	

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FORM SSA-1099 - SOCIAL SECURITY BENEFIT STATEMENT

2015

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

Box 1. Name HENRY BROWN		Box 2. Beneficiary's Social Security 781-00-XXXX	
Box 3. Benefits Paid in 2014 \$13,333.00	Box 4. Benefits Repaid to SSA in	Box 5. Net Benefits Paid for 2014 (Box 3 minus Box 4) \$13,333.00	
DESCRIPTION OF AMOUNT IN BOX 3		DESCRIPTION OF AMOUNT IN BOX 4	
Paid by check or direct deposit	\$10,111.20		
Medicare Part B premiums deducted from your benefits	\$1,258.80		
Medicare Prescription Drug premiums (Part D) deducted from your benefits	\$630.00		
Total Additions	\$13,333.00	Box 6. Voluntary Federal Income Tax Withheld \$1,333.00	
Benefits for 2014	\$13,333.00	Box 7. Address HENRY BROWN 25 DIAMOND ROAD DENVER, NJ 07834	
		Box 8. Claim Number (use this number if you need to contact SSA)	

Form **SSA-1099-SM**

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a. Employee's social security number 781-00-XXXX			
b. Employer identification number (EIN) 70-9XXXXXX		1. Wages, tips, other compensation \$15,100.00	2. Federal income tax withheld \$975.00
c. Employer's name, address, city state and ZIP Code GREEN GRASS GOLF 25 WOOD LANE DENVER, NJ 07834		3. Social security wages \$15,100.00	4. Social security tax withheld \$936.20
		5. Medicare wages and tips \$15,100.00	6. Medicare tax withheld \$218.95
		7. Social security tips	8. Allocated tips
d. Control number		9.	10. Dependant care benefits
e. Employee's name (first, initial, last), address, city, state and ZIP code HENRY BROWN 25 DIAMOND ROAD DENVER, NJ 07834		11. Nonqualified plans	
		12a. See instructions for box 12	
		13. Statutory Employee <input type="checkbox"/> Retiree Plan <input type="checkbox"/> Third-party sickpay <input type="checkbox"/>	
		14. Other NJSUI \$64.18 NJSUI \$37.75 NJFLI \$13.59	
15. State NJ	Employer's state ID number 709XXXXXX	16. State wages, tips, etc. \$15,100.00	17. State income tax \$250.00
		18. Local wages, tips, etc.	19. Local income tax
		20. Locality name	
<p>Form W-2 Wage and Tax Statement 2015</p> <p>Copy B - To Be Filed With Employee's FEDERAL Tax Return.</p> <p>This information is being furnished to the Internal Revenue Service.</p>			

a. Employee's social security number 782-XX-XXXX			
b. Employer identification number (EIN) 70-8XXXXXX		1. Wages, tips, other compensation \$20,900.50	2. Federal income tax withheld \$1,400.00
c. Employer's name, address, city state and ZIP Code JOE'S # 1 BAR & GRILL FUDY CT DENVER, NJ 07834		3. Social security wages \$21,796.50	4. Social security tax withheld \$1,351.38
		5. Medicare wages and tips \$23,300.50	6. Medicare tax withheld \$337.86
		7. Social security tips \$504.00	8. Allocated tips
d. Control number		9.	10. Dependant care benefits
e. Employee's name (first, initial, last), address, city, state and ZIP code MARY BROWN 32145 LONG ROAD DOVER, NJ 07801		11. Nonqualified plans	
		12a. See instructions for box 12 D \$1,400.00	
		13. Statutory Employee <input type="checkbox"/> Retiree Plan <input checked="" type="checkbox"/> Third-party sickpay <input type="checkbox"/>	
		14. Other NJSUI \$88.83 NJSUI \$52.25 NJFLI \$18.81	
15. State NJ	Employer's state ID number 708XXXXXX	16. State wages, tips, etc. \$20,900.50	17. State income tax \$300.00
		18. Local wages, tips, etc.	19. Local income tax
		20. Locality name	
<p>Form W-2 Wage and Tax Statement 2015</p> <p>Copy B - To Be Filed With Employee's FEDERAL Tax Return.</p> <p>This information is being furnished to the Internal Revenue Service.</p>			

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<input type="checkbox"/> CORRECTED (if checked)						
PAYER'S name, address, city, state, ZIP code NATIONAL CITY BANK 15 MAIN ST DENVER, NJ 07834			Payer's RTN (optional)		2015	Interest Income
			1 Interest income \$325.00			
PAYER'S Federal identification number 70-7XXXXXX			RECIPIENT'S identification number 781-00-XXXX		Copy B For Recipient	
			3 Interest on US Savings Bonds and Treas. obligations			
RECIPIENT'S name, address, city, state, and ZIP code HENRY BROWN 25 DIAMOND ROAD DENVER, NJ 07834			4 Federal income tax withheld		5 Investment expenses	
			6 Foreign Tax Paid		7 Foreign Country or US possession	
			8 Tax exempt interest		9 Specified private activity bond interest	
			10 Market Discount		11 Bond Premium	
Account number (see instructions)			12		13 Bond Premium on tax-exempt bond	
			FATCA filing requirement <input type="checkbox"/>			
			14 Tax-exempt and tax credit bond CUSIP no.		15 State	16 State Identification no
					17 State tax withheld	
Form 1099-INT						

<input type="checkbox"/> CORRECTED (if checked)						
PAYER'S name, address, city, state, ZIP code DREYFUS PO BOX 9879 PROVIDENCE, RI 02940			1 Total Ordinary Dividends \$645.00		2015	Dividends and Distributions
			1b Qualified Dividends \$455.00			
PAYER'S Federal identification number 70-6XXXXXX			RECIPIENT'S identification number 781-00-XXXX		Copy B For Recipient	
			2a Total capital gain distr. \$256.00			
RECIPIENT'S name, address, city, state, ZIP code HENRY BROWN 25 DIAMOND ROAD DENVER, NJ 07834			2b Unrecap. Sec. 1250 gain		2c Section 1202 gain	
			2d Collectables (28%) gain		4 Federal income tax withheld \$64.00	
			3 Nondividend distributions		5 Investment expenses	
			6 Foreign Tax Paid		7 Foreign Country or US possession	
Account number (see instructions)			8 Cash liquidation distributions		9 Noncash liquidation distribution	
			10 Exempt-Interest dividends		11 Specified private activity bond interest dividends	
			12 State		13 State Identification no.	14 State tax withheld
Form 1099-DIV						

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<input type="checkbox"/> CORRECTED (if checked)		2015 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S name, address, city, state, ZIP code FIDELITY INVESTMENTS PO BOX 673000 DALLAS, TX 75267		1 Gross distribution \$4,500.00		
		2a Taxable amount \$4,500.00		
		2b Taxable amount not determined. <input type="checkbox"/>	Total Distribution <input type="checkbox"/>	
PAYER'S Federal identification number 70-5XXXXXX	RECIPIENT'S identification number 781-00-XXXX	3 Capital gain (included in box 2a).	4 Federal income tax withheld \$700.00	
RECIPIENT'S name, address, city, state, ZIP code HENRY BROWN 25 DIAMOND ROAD DENVER, NJ 07834		5 Employee contributions / Designated Roth contributions or insurance premiums	6 Net unrealized appreciation in employer's securities	
		7. Distribution Code(s) 7	IRA/ SEP/ SIMPLE <input type="checkbox"/>	8 Other %
		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				

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

<input type="checkbox"/> CORRECTED (if checked)		2015 Form 1099-G		Certain Government Payments
PAYER'S name, address, city, state, ZIP code NEW JERSEY DEPARTMENT OF LABOR PO BOX 908 TRENTON, NJ 08625		1 Unemployment compensation \$5,890.00		
		2 State or local income tax refunds, credits or offsets		
PAYER'S Federal identification number 22-2481818	RECIPIENT'S identification number 782-00-XXXX	Box 2 amount is for tax year	4 Federal income tax withheld \$589.00	
RECIPIENT'S name, address, city, state, ZIP code MARY BROWN 25 DIAMOND ROAD DENVER, NJ 07834		5 RTAA payments	6 Taxable grants	
		7 Agriculture payments	8 If checked, box 2 is trade or business income > <input type="checkbox"/>	
		9 Market gain		
Account number (see instructions)		10. State NJ	10b State identification no.	11 State income tax withheld
Form 1099-G				

Copy B For Recipient

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

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