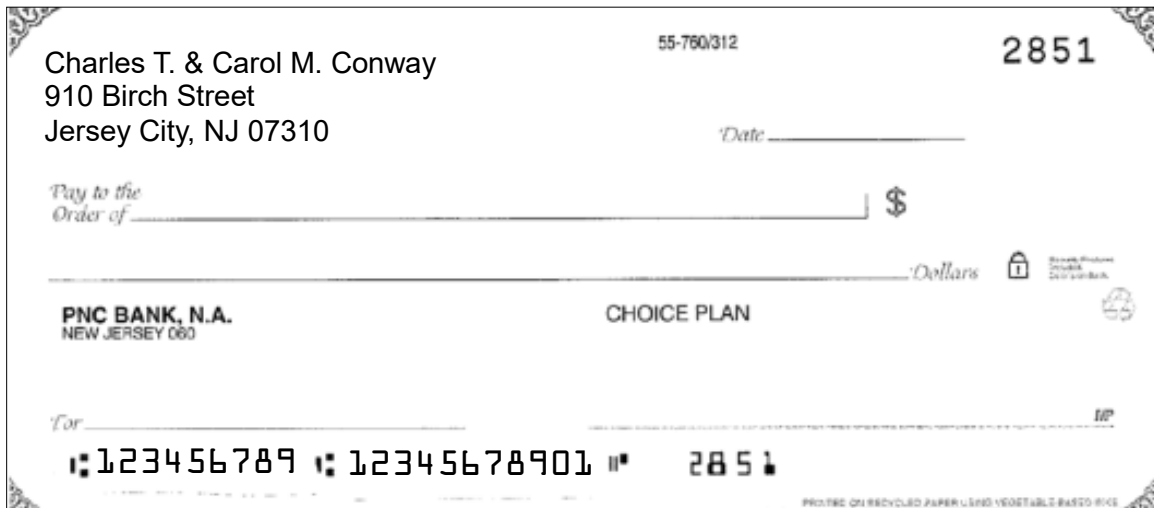
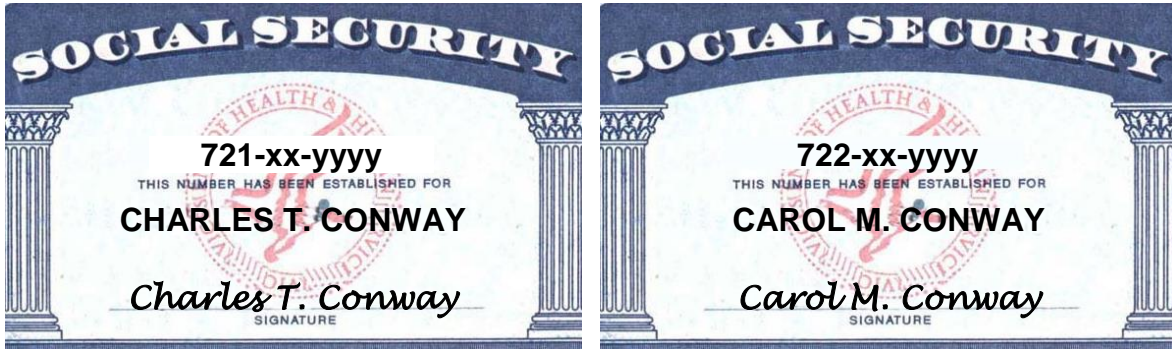


## FAM-02 Conway Scenario


### Interview Notes: (See also: General Notes)

1. The Conways moved from an apartment in Hoboken to an apartment in Jersey City on September 30 of the current tax year. They paid \$2,000/month rent in Hoboken through September and \$1,000/month in Jersey City starting in October.
2. Charles lost his job in August of the current tax year and collected unemployment for the balance of the year.
3. In January of the tax year the Conways purchased a 50" LCD TV from Amazon.com and did not pay sales tax on the purchase amount of \$1,500.00. The sales tax amount would have been \$105.00.

### Documents:




## FAM-02 Conway Scenario

a Employee's social security number <b>721-xx-yyyy</b>		OMB No. 1545-0008		Safe, accurate, FAST! Use		Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
b Employer identification number (EIN) <b>72-9xxyyyy</b>			1 Wages, tips, other compensation <b>32,867.00</b>		2 Federal income tax withheld <b>4,500.00</b>		
c Employer's name, address, and ZIP code <b>Vampire Engineering 32 Blood Ave. Jersey City, NJ 07310</b>			3 Social security wages <b>33,867.00</b>		4 Social security tax withheld <b>2,099.75</b>		
			5 Medicare wages and tips <b>33,867.00</b>		6 Medicare tax withheld <b>491.07</b>		
			7 Social security tips		8 Allocated tips		
d Control number			9		10 Dependent care benefits		
e Employee's first name and initial Last name Suff. <b>Charles T. Conway 967 Water St. Hoboken, NJ 07030</b>			11 Nonqualified plans		12a See instructions for box 12 <b>D</b>   <b>1,000.00</b>		
			13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>		12b		
			14 Other NJSUI <b>136.00</b> NJSDI <b>80.00</b> NJFLI <b>28.80</b>		12c		
					12d		
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
NJ	72-9xxyyyy	33,505.00	1,020.00				

**Form W-2 Wage and Tax Statement 2015** Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.  
This information is being furnished to the Internal Revenue Service.

a Employee's social security number <b>722-xx-yyyy</b>		OMB No. 1545-0008		Safe, accurate, FAST! Use		Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>	
b Employer identification number (EIN) <b>72-8xxyyyy</b>			1 Wages, tips, other compensation <b>20,176.00</b>		2 Federal income tax withheld <b>1,200.00</b>		
c Employer's name, address, and ZIP code <b>Smart Kids Charter Schools 98 Willow Lane Boston, MA 02108</b>			3 Social security wages <b>20,176.00</b>		4 Social security tax withheld <b>1,250.91</b>		
			5 Medicare wages and tips <b>20,176.00</b>		6 Medicare tax withheld <b>292.55</b>		
			7 Social security tips		8 Allocated tips		
d Control number			9		10 Dependent care benefits		
e Employee's first name and initial Last name Suff. <b>Carol M. Conway 910 Birch St. Jersey City, NJ 07310</b>			11 Nonqualified plans		12a See instructions for box 12		
			13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b		
			14 Other NJSUI <b>85.75</b> NJSDI <b>50.44</b> NJFLI <b>18.16</b>		12c		
					12d		
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
NJ	72-8xxyyyy	20,176.00	403.50				

**Form W-2 Wage and Tax Statement 2015** Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.  
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## FAM-02 Conway Scenario

<input type="checkbox"/> CORRECTED (if checked)						
PAYER'S name, address, city, state, ZIP code PNC BANK ROUTE 10 EAST RANDOLPH, NJ 07869			Payer's RTN (optional)		<b>20 15</b> Form 1099-INT	<b>Interest Income</b>
			1 Interest income \$234.00			
PAYER'S Federal identification number 12-3XXXXXX			RECIPIENT'S identification number			
RECIPIENT'S name, address, city, state, and ZIP code CHARLES T CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310			3 Interest on US Savings Bonds and Treas. obligations			
RECIPIENT'S name, address, city, state, and ZIP code CHARLES T CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310			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	
			FATCA filing requirement <input type="checkbox"/>		12	
			13 Bond Premium on tax-exempt bond		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	
Account number (see instructions)			14 Tax-exempt and tax credit bond CUSIP no.			
					16 State Identification no	
					17 State tax withheld	
Form <b>1099-INT</b>						

<input type="checkbox"/> CORRECTED (if checked)						
PAYER'S name, address, city, state, ZIP code NEW JERSEY DEPARTMENT OF LABOR PO BOX 908 TRENTON, NJ 08625			1 Unemployment compensation \$9,860.10		<b>2015</b> Form 1099-G	<b>Certain Government Payments</b>
			2 State or local income tax refunds, credits or offsets			
PAYER'S Federal identification number 22-2481818			RECIPIENT'S identification number 721-XX-XXXX			
RECIPIENT'S name, address, city, state, ZIP code CHARLES T. CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310			3 Box 2 amount is for tax year		4 Federal income tax withheld \$986.01	
RECIPIENT'S name, address, city, state, ZIP code CHARLES T. CONWAY 910 BIRCH ST JERSEY CITY, NJ 07310			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 <b>1099-G</b>						