

PRO-P2 Baylor – Review Guide

E-file created: Optional

AGI: 50,620

Refund/(Amount owed): 1,259

Diagnostic:

Overridden Entries: None

Estimated Entries: Dependent on Template used to create return

Form	Payee/Name/Line	Comment/Reference
Main Info	Name line 2	Ben A Baylor. Do not include %. (Note: good place to mention new context sensitive help)
	Taxpayer Information	Date of death, Spouse: 6/21/2010
	Dependents	Madison Chambers: Mo in Hm=08; Code=1
1040 Wkt1	Medicare Parts B, C . .	Best Practice: 1. enter Part B [1157 and 578] here, Part D on A Detail or 2. enter Part B & D on Wkt1 using a scratch pad
1040 Pg 1	Line 21	"GAMBLING WINNINGS"
Sch A	Line 1	Unreimbursed medical and dental expenses: 14,202
	Line 6	Best Practice: Real estate taxes on scratch pad from 3 rd box. (Primary residence only) 4 th box: 451 (other than Primary residence) Net: 949
A Detail	Other medical	Part D: 426 if it was not included on 1040 Wkt1 with a scratch pad.
	Other than cash contributions	Salvation Army: 350
Dividend Stmt	The Lone Star Fund	Capital gain: 737
Sch M	Line 10	No
W-2G	Line 14	120
	Gambling losses	2,550
1099-R	Defense Finance & Accounting	State Box 2 CHECKED [Active duty military retirement]
All	TSJ boxes	Blank or correct use of T, S, J

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New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0101
NJ 1040 Pg3	Gubernatorial Fund	Taxpayer: No; Spouse: No
	Line 28 [NJ Gross Income]	0
	Line 30 [Medical Expenses]	14,202
	Line 36a [Total Property Taxes Paid]	303 [From Worksheet F]
	Line 36b [Check here if on October 1, 2010 you were a NJ homeowner]	Checked
	Line 36c [Property Tax Deduction]	0 [From Worksheet F]
	Line 37 [NJ Taxable Income]	0
NJ 1040 Pg4	Line 47 [Total NJ Income Tax Withheld]	120
	Line 48 [Property tax credit]	50 [From Worksheet F]
	Line 65 [Refund]	170
	Worksheet F, Line 1, Property taxes . . .	303, the PTR base amount
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed
NJ Ret Wkt	Line 10a [. . . receiving Social Security . .]	Yes