

PRO-P3 Fleming – Review Guide

Review Guide – PRO-P3 – Fleming

E-file created: Optional

AGI: 38,440

Refund/(Amount Owed): (863)

Diagnostic:

Overridden Entries

Overridden Entry 'LINE-3' on 'Wage and Tax Statement'

(Ditto for 'LINE-4', 'LINE-5', and 'LINE-6')

Overridden Entry 'W2ADDR' on 'Wage and Tax Statement'

(ditto for 'W2ADDR2', 'W2ZIP', 'W2CITY', and 'W2STATE')

Estimated Entries: Dependent on Template used to create return

Form	Payee/Name/Line	Comment
Main Info	Taxpayer Information	Check disability box for taxpayer
	Presidential Election	Check You box
	Dependents/Nondependents	Best Practice: list in order of age, youngest first James is code 0: Non-dependents
1040 pg 1	Line 7	22,530. If 17,130, 1099-R [Tri-State] does not have Disability box checked.
Interest Stmt	Global Investment	Exempt Interest: 0 in box 1/3, no state adjustments, E in NAEOB
Sch C Pg1	Line F	Cash accounting
	Line G	Yes
	Part I, line 1	1099-MISC is linked to this line
	Part II, line 9	117 from Sch C page 2 Part IV
	Part II, line 28	5,615 with each item, except car expense, listed either in Part V or on scratch pad [e. g., to line 18 or 22]
Sch C Pg2	Part IV	Line 43: 7/1/2008 Line 44: a=234, b=0, c=10,000 Line 45: Yes; 46: No; 47a: Yes; 47b: Yes
1099-MISC	Line 7	12,876
Sch EIC	All	Unnecessary questions unanswered e.g. 4a, 4b
Sch EIC Wkt	All	Unnecessary questions unanswered e.g. 4b, 9b, 9c, 9d
Sch M	Line 10	No
W-2	Oakwood World-Herald	Take calculations off 3, 4, 5, 6; line 6: 211
		Line 14 add 4 th entry: NJSUI, 6
		Line 15: NJ; line 16: 14,598; line 17: 575
W-2	Butler Inc	Address correction made
		Line 14: change NJSDI to NJSDIPP [Private Plan] (see also NJ-2450)
		Line 15: NJ; line 16: 2,532; line 17: 201

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1099-R	Tri-State Publishers	Disability box checked
All	TSJ boxes	Either T or blank

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New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0906
NJ 1040 Pg3	Gubernatorial Fund	Taxpayer: Yes
	Line 19 [Pensions, . . and IRA Withdrawals]	5000 [From IRA Wkt (01)]
	Line 28 [NJ Gross Income]	27,208
	Line 36a [Total Property Taxes Paid]	2160 [From Worksheet F]
	Line 36c [Property Tax Deduction]	0 [From Worksheet F]
	Line 37 [NJ Taxable Income]	23,708
NJ 1040 Pg4	Line 47 [Total NJ Income Tax Withheld]	776
	Line 48 [Property tax credit]	50 [From Worksheet F]
	Line 51 [Excess NJ UI/WF/SWF]	14 [From NJ 2450]
	Line 65 [Refund]	577
	Worksheet F, Line 1, Rent you paid . . .	12,000
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed
NJ 2450	Line 1b	Enter Plan number 9786654 for Private Plan Disability on Butler W-2 and add 13 to Column B with a scratch pad
NJ 2450	Line 2	A = 140; B = 86; C = 21 If Private Plan Disability on Butler W-2 was not entered, B = 73
NJ IRA Wkt (01)	Part 1, Enter the copy number of the IRA	1 Removing the red fields from the remainder of the form is optional