

## PRO-P4 Sterling – Review Guide

E-file created: Optional

AGI: 57,162

Refund/(Amount owed): 1,201

Diagnostic:

Overridden Entries: None

Estimated Entries: Dependent on Template used to create return

Form	Payee/Name/Line	Comment/Reference
Main Info	Names & SSNs	Spouse: Last name blank
	Taxpayer Information	Check if blind / Spouse: Check Yes
	Samantha Summers	Code = 1
1040 Wkt1	Medicare Parts B, C .	Best Practice: enter Part B [1157] here, Part D on A Detail or enter Part B & D on Wkt1 using a scratch pad
Sch A Detail	Other medical expenses	Part D: 810 if it was not included on 1040 Wkt1 with a scratch pad
Sch M	Line 10	No
1099-R	Averell Pension Fund	Simplified Method line 2: 66-70 (optional – has no effect) line 2: annuity starting after 12/31/1997 and combined age 121-130 line 5 = 454 (because started receiving in Jan 2008) line 6 = 227 (calculated)
1116	Included	Use 1116 instead of direct entry on 1040, line 47
All	TSJ boxes	Blank or correct use of T, S, J

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### New Jersey

<b>Form</b>	<b>Payee/Name/Line</b>	<b>Comment/Reference</b>
NJ 1040 Pg1	County/Municipality code	1439
NJ 1040 Pg3	Gubernatorial Fund	Taxpayer: No; Spouse: No
	Line 28 [NJ Gross Income]	24,202
	Line 30 [Medical Expenses]	1483
	Line 36a [Total Property Taxes Paid]	2268 [From Worksheet F]
	Line 36c [Property Tax Deduction]	0 [From Worksheet F]
	<b>Line 37 [NJ Taxable Income]</b>	<b>17,219</b>
	Line 44 [Use Tax Due]	22
	Line 44 [Enter the amount of out-of-state purchases]	314
NJ 1040 Pg4	Line 47 [Total NJ Income Tax Withheld]	0
	Line 48 [Property tax credit]	50 [From Worksheet F]
	<b>Line 55 [Amount you owe]</b>	<b>213</b>
	Worksheet F, Line 1, Rent you paid . . .	Best Practice: scratch pad with 6 months at \$1,000 and 6 months at \$1,100
NJ DD Wkt	Direct Debit of Balance Due	Check here if you will mail your balance due.