

N11-P1 Jones

Form 13614-C (Rev. 10-2011)	Department of the Treasury – Internal Revenue Service Intake/Interview & Quality Review Sheet	OMB # 1545-1964
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Section A. You should complete Pages 1-3

Thank you for allowing us to prepare your tax return. You are responsible for the information on your return so please provide complete and accurate information to the certified tax preparer. If you have any questions please ask your preparer.

You will need your:

- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Proof of Identity (such as a valid drivers license or other government issued picture ID).

Part I. Your Personal Information

1. Your First Name Thomas	M. I.	Last Name Jones	Are you a U.S. Citizen? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
2. Spouse's First Name Janet	M. I.	Last Name Jones	Is spouse a U.S. Citizen? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
3. Mailing Address 123 Elm St	Apt#	City Tuckerton	State NJ	Zip Code 08087
4. Contact Information Phone: 609-555-5555 Cell Phone: E-mail:				
5. Your Date of Birth 02/01/1926	6. Your Job Title Engineer	Are you: 8. Totally and Permanently Disabled	7. Legally Blind	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
9. Spouse's Date of Birth 07/21/1950	10. Spouse's Job Title Homemaker	Is Spouse: 12. Totally and Permanently Disabled	11. Legally Blind	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
13. Can anyone claim you or your spouse on their tax return? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Unsure				

Part II. Marital Status and Household Information

1. As of December 31, 2011, were you?
- Single
- Married: Did you live with your spouse during any part of the last six months of 2011? Yes No
- Divorced or Legally Separated: Date of final decree or separate maintenance agreement: _____
- Widowed: Year of spouse's death: _____

2. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please check here and list on page 3.

Name (first, last) Do not enter your name or spouse's name below.	Date of Birth (mm/dd/yy)	Relationship to you (e.g. daughter, son, mother, sister, none)	Number of months lived in your home in 2011	US Citizen or resident of the US, Canada or Mexico in 2011 (yes/no)	Marital Status as of 12/31/11 (S/M)	Full-time student in 2011 (yes/no)	Received less than \$3700 income in 2011 (yes/no)
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)

- **Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.**
- To report unethical behavior to IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

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Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.

Part III. Income – In 2011, did you (or your spouse) receive:

Yes	No	Unsure	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Wages or Salary? (Form W-2)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2. Tip Income?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. Scholarships? (Forms W-2, 1098-T)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Refund of state/local income taxes? (Form 1099-G)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6. Alimony Income?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7. Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9. Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11. Unemployment Compensation? (Form 1099-G)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13. Income (or loss) from Rental Property?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: _____ (Forms W-2 G, 1099-MISC)

Part IV. Expenses – In 2011 Did you (or your spouse) pay:

Yes	No	Unsure	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. Alimony: If yes, do you have the recipient's SSN? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2. Contributions to a retirement account? <input type="checkbox"/> IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> 401K <input type="checkbox"/> Other
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4. Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Medical expenses (including health insurance premiums)?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6. Home mortgage interest? (Form 1098)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8. Charitable contributions?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9. Child/dependent care expenses, such as day-care?

Part V. Life Events – In 2011 Did you (or your spouse):

Yes	No	Unsure	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5. Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6. Live in an area that was affected by a natural disaster? If yes, where? _____
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7. Receive the First Time Homebuyers Credit in 2008?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8. Pay any student loan interest? (Form 1098-E)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much? _____ \$320-NJ
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10. Attend school as a full time student? (Form 1098-T)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11. Adopt a child?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?

Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.)

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund You Spouse

Catalog Number 52121E

Form 13614-C (Rev. 10-2011)

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Additional Information and Questions related to the preparation of your return

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.

Other than English what language is spoken in the home? POLISH

Are you or a member of your household considered disabled? Yes No

If you are due a refund or have a balance due:

- Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days.
- Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of \$50 and earn interest for up to 30 years.

- If you are due a refund, would you like a direct deposit? Yes No
- If you are due a refund, would you like information on how to purchase U.S. Savings Bonds? Yes No
- If you are due a refund, would you like information on how to split your refund between accounts? Yes No
- If you have a balance due, would you like to make a payment directly from your bank account? Yes No

Additional comments:

STOP HERE!

Thank you for completing this form.
Please give this form to the certified volunteer preparer for use in preparing your return.

Your Civil Rights are Protected: It is the Internal Revenue Service's mission to provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all. Under no circumstances will the Internal Revenue Service tolerate discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE shall be excluded from participating in, be denied the benefits of, or be subject to discrimination because of race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by the Department of Treasury – Internal Revenue Service. Any person who believes that he/she has been discriminated against on the basis of race, color, sex, national origin, disability, reprisal or age in programs or activities receiving financial assistance (e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury IRS, may submit a written complaint to: National Headquarters; Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division (External Civil Rights Team); 1111 Constitution Ave., NW Room 2422; Washington, DC 20224.

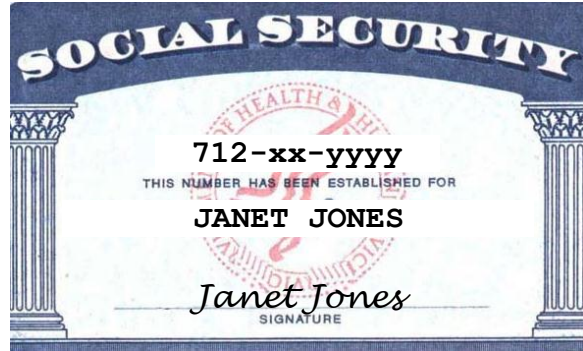
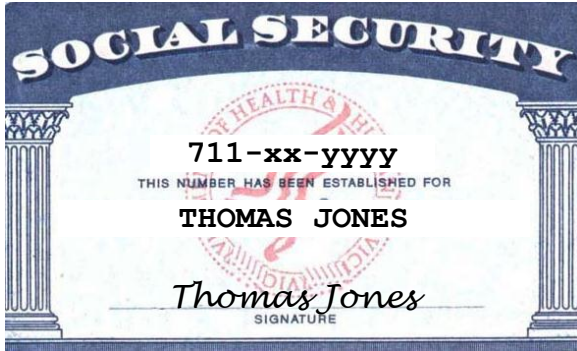
Paperwork Reduction Act Notice


The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Interview Notes:

1. Thomas wants to contribute to the Presidential Election Campaign Fund but not to the Gubernatorial Election Campaign Fund. Janet wants to contribute to both.
2. Thomas and Janet live in Ocean County and want to file a joint return. The NJ County/Municipality Code for Tuckerton is 1533. The NJ County/Municipality Code for Toms River is 1508.
3. Thomas retired from the Railroad on January 1, 1998 and receives Tier 1 income & Tier 2 income. His pension is not a joint annuity. The amount recovered tax free in prior years is \$13,728.
4. Janet closed out her AXA IRA this year and rolled \$5,000 of it over to an IRA at Vanguard within 60 days. She used the remainder for credit card bills.
5. They received a NJ Income Tax Refund of \$685. (They had to look this up online because they did not receive a 1099-G.)
6. They itemized deductions in 2010. Values on their 2010 return:
 - a. Schedule A, Line 5a (State Income Tax)\$1,845
 - b. Schedule A, Line 5b (General Sales Tax).....\$520
 - c. Total itemized deductions\$13,147
 - d. Taxable income\$53,000
7. They used \$850 of their \$1,200 pre-tax medical benefit from K&B Engineers for various doctor bills and prescription drugs. They had \$703 of deductible unreimbursed medical costs. Their Long Term Care insurance premiums were \$4,500 for Thomas and \$4,000 for Janet.
8. Real estate taxes paid were \$6,263. They sold their home at 17 Helen Street, Toms River, NJ 08753 on October 31st (no taxable gain to be reported) and moved into a rental unit for the rest of the year on November 1st. They paid \$1,100 per month rent starting on September 1st.
9. Before selling their house, they made some major renovations. Their renovation costs this year were: Materials \$8,560 (including NJ sales tax) and Labor: \$3,450.
10. Last year (for the first time) they received a \$100 credit for energy efficient improvements. Their renovations this year included some components which also qualify as energy efficient:
 - a. Insulation – Materials: \$570; Labor: \$200
 - b. New front door – Materials: \$500; Labor: \$520
 - c. New furnace – Materials: \$2,000; Labor: \$1,200
11. They did not make estimated tax payments to the federal government. However, they did make New Jersey estimated tax payments for 2011 of \$80 on 4/15, 6/15, 9/15, & 12/30. They made their last NJ estimated tax payment for 2010 of \$95 on January 15, 2011.
12. They received a PTR Refund of \$755. The base year amount was \$8,544.
13. They did not make any purchases on which they would owe NJ Use Tax.
14. They want their NJ refund / amount owed handled the same as their federal return.

Documents:



a Employee's social security number 711-xx-yyyy		OMB No. 1545-0008		Safe, accurate, FAST! Use 		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 71-9xxxxxxx		1 Wages, tips, other compensation 26,200.00	2 Federal income tax withheld 1,240.00				
c Employer's name, address, and ZIP code K&B Engineers, Inc. 123 Main St Manahawkin, NJ 08050		3 Social security wages 26,200.00	4 Social security tax withheld 1,100.00				
		5 Medicare wages and tips 26,200.00	6 Medicare tax withheld 380.00				
		7 Social security tips	8 Allocated tips				
d Control number		9 Advance EIC payment		10 Dependent care benefits			
e Employee's first name and initial Last name Thomas Jones 123 Elm St Tuckerton, NJ 08087		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 NJSDI 137.00 NJSUI 116.45 NJFLI 16.44 TxMed 1,200.00		12c			
				12d			
f Employee's address and ZIP code							
15 State NJ	Employer's state ID number 71-9xxxxxxx	16 State wages, tips, etc. 27,400.00	17 State income tax 674.00	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
Form W-2 Wage and Tax Statement		2011		Department of the Treasury—Internal Revenue Service			

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PAYER'S name, street address, city, state, and ZIP code		1 Gross distribution	OMB No. 1545-0119	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
National Financial Services, LLC Agents for Fidelity Trust Co. 200 Liberty St., 5th Flr. New York, NY 10281		\$ 6,875.00	2011 Form 1099-R	
		2a Taxable amount		\$ 6,875.00
PAYER'S federal identification number		2b Taxable amount not determined <input type="checkbox"/>		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.
71-8xxxxxx		Total distribution <input type="checkbox"/>		
RECIPIENT'S identification number		3 Capital gain (included in box 2a)	4 Federal income tax withheld	This information is being furnished to the Internal Revenue Service.
712-xx-yyyy		\$	\$ 687.00	
RECIPIENT'S name		5 Employee contributions /Designated Roth contributions or insurance premiums	6 Net unrealized appreciation in employer's securities	This information is being furnished to the Internal Revenue Service.
Janet Jones		\$	\$	
Street address (including apt. no.)		7 Distribution code(s)	8 Other	This information is being furnished to the Internal Revenue Service.
123 Elm St		7	\$ %	
City, state, and ZIP code		9a Your percentage of total distribution %	9b Total employee contributions	This information is being furnished to the Internal Revenue Service.
Tuckerton, NJ 08087		%	\$	
1st year of desig. Roth contrib.		10 State tax withheld	11 State/Payer's state no.	12 State distribution
		\$		\$
Account number (see instructions)		13 Local tax withheld	14 Name of locality	15 Local distribution
		\$		\$

Form 1099-R Department of the Treasury - Internal Revenue Service

PAYER'S name, street address, city, state, and ZIP code		1 Gross distribution	OMB No. 1545-0119	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
AXA Equitable 100 Madison St Syracuse, NY 13202-2720		\$ 5,827.00	2011 Form 1099-R	
		2a Taxable amount		\$ 5,827.00
PAYER'S federal identification number		2b Taxable amount not determined <input type="checkbox"/>		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.
71-7xxxxxx		Total distribution <input checked="" type="checkbox"/>		
RECIPIENT'S identification number		3 Capital gain (included in box 2a)	4 Federal income tax withheld	This information is being furnished to the Internal Revenue Service.
712-xx-yyyy		\$	\$ 583.00	
RECIPIENT'S name		5 Employee contributions /Designated Roth contributions or insurance premiums	6 Net unrealized appreciation in employer's securities	This information is being furnished to the Internal Revenue Service.
Janet Jones		\$	\$	
Street address (including apt. no.)		7 Distribution code(s)	8 Other	This information is being furnished to the Internal Revenue Service.
123 Elm St		7	\$ %	
City, state, and ZIP code		9a Your percentage of total distribution %	9b Total employee contributions	This information is being furnished to the Internal Revenue Service.
Tuckerton, NJ 08087		%	\$	
1st year of desig. Roth contrib.		10 State tax withheld	11 State/Payer's state no.	12 State distribution
		\$		\$
Account number (see instructions)		13 Local tax withheld	14 Name of locality	15 Local distribution
		\$		\$

Form 1099-R Department of the Treasury - Internal Revenue Service

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PAYER'S NAME, STREET ADDRESS, CITY, STATE, AND ZIP CODE United State Railroad Retirement Board 844 N Rush St., Chicago, IL 60611		20XX		PAYMENTS BY THE RAILROAD RETIREMENT BOARD		
PAYER'S FEDERAL IDENTIFYING NO. 71-6xxyyyy		3. Gross Social Security Equivalent Benefit Portion of Tier 1 Paid in 2009		\$ 6,265.00	COPY C - FOR RECIPIENT'S RECORDS THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE.	
1. Claim Number and Payee Code		4. Social Security Equivalent Benefit Portion of Tier 1 Repaid to RRB in 2009				
2. Recipient's Identification Number 711-xx-yyyy		5. Net Social Security Equivalent Benefit Portion of Tier 1 Paid in 2009		\$ 6,265.00		
Recipient's Name, Street Address, City, State, and Zip Code Thomas Jones 110 Main St Tuckerton, NJ 08087		6. Workers' Compensation Offset in 2009				
		7. Social Security Equivalent Benefit Portion of Tier 1 Paid for 2009				
		8. Social Security Equivalent Benefit Portion of Tier 1 Paid for 2007				
		9. Social Security Equivalent Benefit Portion of Tier 1 Paid for Years Prior to 2005				
		10. Federal Income Tax Withheld Fed W/H \$ 685		11. Medicare Premium Total \$ 1,158		
FORM RRB-1099		DO NOT ATTACH TO YOUR INCOME TAX RETURN				

PAYER'S NAME, STREET ADDRESS, CITY, STATE, AND ZIP CODE United State Railroad Retirement Board 844 N Main St., Chicago, IL 60611		20XX		ANNUITIES OR PENSIONS BY THE RAILROAD RETIREMENT BOARD	
PAYER'S FEDERAL IDENTIFYING NO. 71-6xxyyyy		3. Employee Contributions		\$ 14,084	COPY B - REPORT THIS INCOME ON YOUR FEDERAL TAX RETURN. IF THIS FORM SHOWS FEDERAL INCOME TAX WITHHELD IN BOX 9 ATTACH THIS COPY TO YOUR RETURN. THIS INFORMATION IS BEING FURNISHED TO THE INTERNAL REVENUE SERVICE.
1. Claim Number and Payee Code		4. Contributory Amount Paid		\$ 8,356	
2. Recipient's Identification Number 711-xx-yyyy		5. Vested Dual Benefit			
Recipient's Name, Street Address, City, State, and ZIP Code Thomas Jones 110 Main St Tuckerton, NJ 08087		6. Supplemental Annuity			
		7. Total Gross Paid		\$ 8,356	
		8. Repayments			
		9. Federal Income Tax Withheld		\$ 836	
		10. Rate of Tax			
FORM RRB-1099-R			11. Country	12. Medicare Premium Total	

Fly By Nite Investments
EIN 71-5xyyyy

Client: Thomas Jones
711-xx-yyyy

2011 Tax Statement

Substitute 1099-INT

Box 1 Interest income.....	95.00
Box 2 Early withdrawal penalty	0.00
Box 3 Interest on U.S. Savings Bonds and Treas. Obligations	169.00
Box 4 Federal income tax withheld	0.00
Box 5 Investment Expenses	0.00
Box 6 Foreign tax paid	0.00
Box 8 Tax exempt interest.....	591.00
Box 9 Specified private activity bond interest	0.00

Interest Detail

<u>Security</u>	<u>Date</u>	<u>Amount</u>
Money Market Savings	Various	95.00
NY Thruway Bond (issued by State of NY)	03-15-2011	87.50
	06-15-2011	87.50
	09-15-2011	87.50
	12-15-2011	87.50
	Total	350.00
U.S. Savings Bonds	03-31-2011	42.25
	06-30-2011	42.25
	09-30-2011	42.25
	12-31-2011	42.25
	Total	169.00
Delaware Memorial Bridge (issued by State of NJ)	02-15-2011	60.25
	05-15-2011	60.25
	08-15-2011	60.25
	11-15-2011	60.25
	Total	241.00