

## N11-P2 Mitchel – Review Guide

E-file created: Optional

AGI: 68,650

Refund/(Amount Owed): 3,000

Diagnostic:

Overridden Entries

Overridden Entry 'LINE-16A' on 'Wage and Tax Statement'

Overridden Entry '1RTN' on 'Allocation of Refund'

Overridden Entry '1CKG' on 'Allocation of Refund'

Overridden Entry '1SAVG' on 'Allocation of Refund'

Overridden Entry '1ACCT' on 'Allocation of Refund'

Estimated Entries: Dependent on Template used to create return

Form	Payee/Name/Line	Comment
Main Info	Spouse Last name	Should be blank
	Mailing address, city	Kinnelon
	Email address	HANDJM@MYMAIL.COM
	Cell phone	862-555-2222
	Email address	Should be entered
	Presidential Election	Check You box but not Spouse box
	Dependents – Emma	Code=3
Cap Gn Wkt	Lines	500 FBNTENA for ST and LT - separate lines
	Lines	Georgia condo included
	1099 column	B for FBNTENA A for TWX C for Georgia condo
	(b) Code column and (g) Adjustments to gain or loss	(b)=O and (g)=-25 for TWX (b)= L and (g)=7,000 for Georgia condo
1040 Wkt2	Educator Expenses	250 in Taxpayer column
1040 Pg 1	21	Type: GAMBLING WINNINGS Amount: 26,300
1040 Pg 2	75	702
Sch A	1	450 (from A Detail)
	5a	2,343
	6 (third box)	6,900
	6 (fourth box)	3,000
	21	Type: EDUCATOR EXPENSES (or something similar) Amount: 125
	28	Amount: 14,900 (from W2G worksheets)
A Detail	Other medical expenses	PRESCRIPTION DRUGS = 450
Sch D Pg 1	6	1,202
	14	3,030

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W2 (Smart Kids)	Check to take calculations off of line 16	Checked
	14	414H included
	15	State ID Correct
	16	47,760
	17	1,500
F/S Tax Pd	Federal: From last year	Amount of payment = 121
	State: state and/or local balance due...	51
W2G (ABC Casino)	This W-2G is for the:	Spouse
	Gambling losses	4,000
W2G (NJ Lottery Henry)	This W-2G is for the:	Taxpayer
	* See F-1 Help on the state return...	Checked
	Gambling losses	5,700 (=5,200 + 500)
W2G (NJ Lottery Janet)	This W-2G is for the:	Spouse
	* See F-1 Help on the state return...	NOT Checked
	Gambling losses	5,200
8888	1a	1,000
	1b, 1c	RTN=310000530, Checking
	1d	87-3378 (include hyphen, but not special characters)
	2a	1,000
	2b, 2c	RTN=310000530, Savings
	2d	87-3379 (include hyphen, but not special characters)
	4	0
	5a	500
	5b	HENRY MITCHEL
	5c	Beneficiary box checked Beneficiary = EMMA SMITH
	6a	500
	6b	JANET MITCHEL
	6c	Beneficiary box checked Beneficiary = EMMA SMITH
Prep Use	11	NONE
	12	NO
	13	Filled in
	14	Not filled in by preparer
All	TSJ boxes	Either T/S/J or blank

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### New Jersey

<b>TW Worksheet</b>	<b>Payee/Name/Line</b>	<b>Comment/Reference</b>
NJ 1040 Pg1	County/Municipality	1415
NJ 1040 Pg3	11 Dependents attending colleges	1
	Gubernatorial Elections Fund	TP = No SP = No
	18	560 (adjusted via NJ Sch B)
	23	1,400
	30	296 (calculated via Scratch Pad)
	36b	Checked
	36c	6,900
	37	37,024
	44	0 (not red)
Scratch Pad	Description	Ties to NJ line 30
	Fed Sch A amount	450
	Cafeteria amount	600_240 = 840
	NJ 2% amount	-994 (document calculation including amount used from line 28)
NJ 1040 Pg4	47	2,000
	65	1,422
	Worksheet F line 1 Property taxes	6,900
NJ Sch B	1 FED SCH D	613
	3	-53 (from Scratch Pad)
Scratch Pad	Description	Show tie to NJ Sch B
	FBNTENA LT	-40
	FBNTENA ST	-13
NJ DD Wkt	Direct Deposit and Direct Debit Information	Check here to have a refund check mailed to you