

LAW-L1 Kent Changes from 4491-W

1. Change all 2011 to 2012
2. 13614-C: Use filled out PDF Intake Sheet (final instead of draft plus some edits – see below)
3. 13614-C + All Forms - City, ST, Zip: Denville, NJ 07834
4. 13614-C Telephone: 973-555-1234
5. 13614-C Add Cell Phone: 862-555-5678
6. 13614-C Kendra Birthdate: 03-13-1991 (to trigger dependent in college on NJ)
7. 13614-C Order of dependents: Switch Kara & Tamara (to encourage discussion of dependent entry order to be used on Main Info worksheet)
8. 13614-C Use Tammy instead of Tamara on Intake Sheet
9. 13614-C Leave Section B blank (to encourage discussion of interview process)
10. Note 3: Just say “her college”
11. Note 8: Remove mention of “other income reported on a K-1” (Not willing to assume K-1 reported stuff from estate not taxable to beneficiary)
12. Note 13: New – add LT Loss carry-forward from last year
13. Line 7, W-2 Jefferson Intermediate School District: Fill in UI / DI / FLI / 414H
14. Line 7, W-2 Americus Petroleum: Fill in DI (with PP#) / UI / FLI
15. Line 8, 1099-INT Gordon Investments: Add text to clarify that tax-exempt interest is tax-exempt for NJ also.
16. Line 9, Dividends: Comment about foreign accounts – move to Notes
17. Line 10, 1099-G removed and state refund amount determined by online lookup tool. Information from prior year return adjusted (to better illustrate St Tax Refund worksheet calculations) and 1099-G removed to force lookup online of 1099-G info
18. Line 13, 1099-B from Pelrum: Change text to make it clear that commission goes with current tax year sale (instead of original purchase)
19. Line 16, 1009-R DFAS: Change address to illustrate need to update on TW Worksheet
20. Line 21, W2-G: Change to NJ Lottery and change loss amount to 1,000
21. Line 23, Educator Expenses: Lower amount below allowable Adjustment threshold (to avoid excess on Sch A complications)
22. Line 40: Combine County, City, & Personal property tax into single Real estate tax
23. Line 49: Add extra info for new 8863 questions for both Kendra and Kara
24. Line 75: Removed application of half of refund to next year’s taxes
25. **?Maybe?** Homestead Benefit payment
26. **?Maybe?** PTR (Too much income?)
27. **?Maybe?** Add \$\$ to Saulk IRA so adding NJ IRA Wkt will change NJ Taxable Income; Switch Saulk & Yale IRAs so more obvious need to #2 NJ IRA Wkt

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