

# FAM-06 Barufkin Scenario

Form <b>13614-C</b> (Rev. 10-2012)	Department of the Treasury – Internal Revenue Service <b>Intake/Interview &amp; Quality Review Sheet</b>	OMB # 1545-1964
---------------------------------------	---	-----------------

**Section A. Complete Pages 1-3**

You are responsible for the information on your return so please provide complete and accurate information to the IRS certified volunteer 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.
- Picture ID (such as a valid driver's license or other government issued ID for you and your spouse, if applicable).

**Part I. Your Personal Information**

1. Your First Name <u>Josh</u>	M. I.	Last Name <u>Barufkin</u>	Are you a U.S. Citizen? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2. Your Spouse's First Name <u>Anshu</u>	M. I.	Last Name <u>Nagesh</u>	Is your spouse a U.S. Citizen? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3. Mailing Address <u>876 Kealing Ave.</u>	Apt# <u>9A</u>	City <u>Wyckoff</u>	State <u>NJ</u> Zip Code <u>07481</u>
4. Contact Information Phone: <u>201-555-2345</u> Cell Phone: _____ E-mail: _____			
5. Your Date of Birth <u>11/18/1978</u>	6. Your Job Title <u>Bus Driver</u>	Are you: 7. Legally Blind <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 8. Totally and Permanently Disabled <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
9. Your Spouse's Date of Birth <u>08/07/1979</u>	10. Your Spouse's Job Title <u>Custodian</u>	Is Your Spouse: 11. Legally Blind <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 12. Totally and Permanently Disabled <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, 2012, were you?  
 Single  
 Married: Did you live with your spouse during any part of the last six months of 2012?  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 2012 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2012. 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. (a)	Date of Birth (mm/dd/yy) (b)	Relationship to you (e.g. daughter, son, mother, sister, none) (c)	Number of months lived in your home in 2012 (d)	US Citizen or resident of US, Canada or Mexico in 2012 (yes/no) (e)	Marital Status as of 12/31/12 (S/M) (f)	Full-time Student in 2012 (yes/no) (g)	Received less than \$3800 income in 2012 (yes/no) (h)
Alice Negesh	04/14/03	Daughter	12	Yes	S	Yes	Yes
Samual Barufkin	01/06/06	Son	12	Yes	S	Yes	Yes

**To check the status of your REFUND visit "Where's My Refund?" on [www.irs.gov](http://www.irs.gov) or call 1-800-829-1954 for assistance.**

**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](mailto:wi.voltax@irs.gov) or call toll free 1-877-330-1205.**

# FAM-06 Barufkin Scenario

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

## Part III. Income – In 2012, did you (or your spouse) receive:

Yes No Unsure

1. Wages or Salary? (Form W-2) If yes, how many jobs did you have in 2012? 2
2. Tip Income?
3. Scholarships? (Forms W-2, 1098-T)
4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
5. Refund of state/local income taxes? (Form 1099-G)
6. Alimony Income?
7. Self-Employment Income? (Form 1099-MISC)
8. Cash/check payments for any work performed not reported on Forms W-2 or 1099?
9. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
10. Disability Income (such as payments from insurance, or workers compensation)? (Forms 1099-R, W-2)
11. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
12. Unemployment Compensation? (Form 1099-G)
13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
14. Income (or loss) from Rental Property?
15. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)? (Forms W-2 G, 1099-MISC)  
Specify: \_\_\_\_\_

## Part IV. Expenses – In 2012 Did you (or your spouse) pay:

Yes No Unsure

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

## Part V. Life Events – In 2012 Did you (or your spouse):

Yes No Unsure

1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)
2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)
3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? \_\_\_\_\_
5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
6. Live in an area that was affected by a natural disaster? If yes, where? \_\_\_\_\_
7. Receive the First Time Homebuyers Credit in 2008?
8. Pay any student loan interest? (Form 1098-E)
9. Make estimated tax payments or apply last year's refund to your 2012 tax? If so how much? \_\_\_\_\_
10. Attend school as a full time student? (Form 1098-T)
11. Adopt a child?
12. File a 2011 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?
13. Become a victim of identity theft?

**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

# FAM-06 Barufkin Scenario

---

## 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? Hindustani

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, safest way to receive your tax refund. When you combine e-file and direct deposit, the IRS will likely issue your refund 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:

---

---

---

---

---

---

---

---

---

---

Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. No taxpayer shall be subject to discrimination on the basis of sex, race, color, national origin, reprisal, disability or age in educational programs or activities supported by the Department of the Treasury – Internal Revenue Service.

Taxpayers with a disability may require a reasonable accommodation in order to participate or receive the benefits of a program or activity supported by the Department of the Treasury – Internal Revenue Service. Site Coordinators and Managers are responsible for ensuring that requests for reasonable accommodation are granted when the request is made by a qualified individual with a disability.

If a qualified taxpayer believes that he or she has been discriminated against based on sex, race, color, national origin, disability, reprisal or age, they can file a complaint with the Department of the Treasury – Internal Revenue Service. All written complaints should be sent to:

Director, Civil Rights Division  
Internal Revenue Service  
1111 Constitution Avenue, NW, Rm. 2413  
Washington, DC 20224

For all inquiries concerning taxpayer civil rights, contact us at the address referenced above, or e-mail us at [eeo.external.civil.rights@irs.gov](mailto:eeo.external.civil.rights@irs.gov).

---

### STOP HERE!

Thank you for completing this form.

#### Paperwork Reduction Act Notice

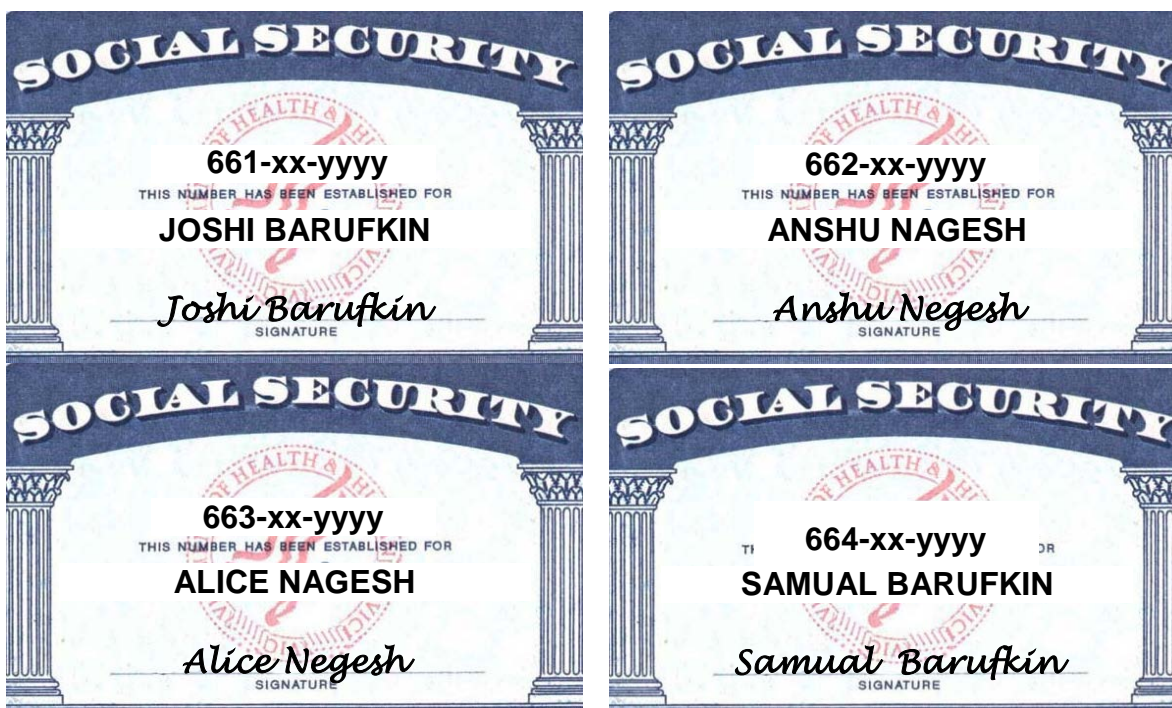
The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, 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

## FAM-06 Barufkin Scenario

### Interview Notes:


1. By consulting your preparer resources you determine that the correct filing status for the Barufkins is Married Filing Jointly.
2. After asking the questions in Part B of the Intake/Interview Sheet you determine that Joshi & Anshu provide full support for Alice & Samual.
3. After examining last year's return, you determine that the Barufkins did not itemize deductions last year.
4. The Barufkins paid \$15,200 in rent for the year.
5. Joshi & Anshu's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund.
6. The Barufkins are US citizens (i.e. they are not non-resident aliens).
7. Neither of the Barufkins can be a qualifying child of another person for EIC purposes. No other person can claim either child for EIC.
8. The SSN for both children is valid for EIC purposes.
9. The Barufkins have never had their EIC reduced or disallowed.
10. By consulting your preparer resources you determine that Wyckoff is located in Bergen County – NJ Code 0270
11. The Barufkins had no out-of-state purchases on which they did not pay Use tax.
12. Both children are covered by health insurance.

### Documents:






## FAM-06 Barufkin Scenario

a Employee's social security number <b>661-xx-yyyy</b>		OMB No. 1545-0008		Safe, accurate, FAST! Use				Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>					
b Employer identification number (EIN) <b>66-9xxxxxyy</b>		1 Wages, tips, other compensation <b>22,810.49</b>		2 Federal income tax withheld <b>2,281.00</b>									
c Employer's name, address, and ZIP code <b>United Airlines PO Box 6610 Chicago, IL 60610</b>		3 Social security wages <b>22,810.49</b>		4 Social security tax withheld <b>958.04</b>									
		5 Medicare wages and tips <b>22,810.49</b>		6 Medicare tax withheld <b>330.75</b>									
		7 Social security tips		8 Allocated tips									
d Control number		9		10 Dependent care benefits									
e Employee's first name and initial Last name <b>Joshi Barufkin 876 Kealing Ave. Apt 9A Wyckoff, NJ 07481</b>		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 <b>45.62</b> NJSUI <b>96.94</b> NJFLI <b>18.25</b>		12c									
				12d									
f Employee's address and ZIP code		15 State Employer's state ID number <b>NJ 669xxxxxyy</b>		16 State wages, tips, etc. <b>22,810.4</b>		17 State income tax <b>684.00</b>		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

**Form W-2 Wage and Tax Statement 2012** Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return...  
This information is being furnished to the Internal Revenue Service.

a Employee's social security number <b>662-xx-yyyy</b>		OMB No. 1545-0008		Safe, accurate, FAST! Use				Visit the IRS website at <a href="http://www.irs.gov/efile">www.irs.gov/efile</a>					
b Employer identification number (EIN) <b>66-9xxxxxyy</b>		1 Wages, tips, other compensation <b>13,180.00</b>		2 Federal income tax withheld <b>275.00</b>									
c Employer's name, address, and ZIP code <b>United Airlines PO Box 6610 Chicago, IL 60610</b>		3 Social security wages <b>13,180.00</b>		4 Social security tax withheld <b>553.56</b>									
		5 Medicare wages and tips <b>13,180.00</b>		6 Medicare tax withheld <b>191.11</b>									
		7 Social security tips		8 Allocated tips									
d Control number		9		10 Dependent care benefits									
e Employee's first name and initial Last name <b>Anshu Nagesh 876 Kealing Ave. Apt 9A Wyckoff, NJ 07481</b>		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 <b>26.36</b> NJSUI <b>56.02</b> NJFLI <b>10.54</b>		12c									
				12d									
f Employee's address and ZIP code		15 State Employer's state ID number <b>NJ 669xxxxxyy</b>		16 State wages, tips, etc. <b>13,180.00</b>		17 State income tax <b>260.00</b>		18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

**Form W-2 Wage and Tax Statement 2012** Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return...  
This information is being furnished to the Internal Revenue Service.