

**ALABAMA DEPARTMENT OF REVENUE
TEST SCENARIOS FOR THE 2011
ALABAMA INDIVIDUAL INCOME TAX RETURN
TEST # 6**

FORMS REQUIRED:

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
ALABAMA SCHEDULE A: ITEMIZED DEDUCTIONS
ALABAMA SCHEDULE B: INTEREST AND DIVIDEND INCOME

RETURNS NEEDED:

1 - FEDERAL FORM W-2

OTHER INFORMATION ABOUT THE TEST:

ALABAMA OVERPAYMENT TO BE APPLIED TO **2011** ESTIMATED TAX: 2500

MAY IRS DISCUSS THE RETURN WITH PREPARER: YES
MAY ALABAMA DISCUSS THE RETURN WITH PREPARER: YES

PREPARER FIRM: Rocket Refund, Inc
PREPARER SSN: 223-42-1801
PREPARER EIN: 63- 9287210
PREPARER PHONE: (334)240-1219
PREPARER SELF-EMPLOY IND: YES

PREPARER ADDRESS: 10 Nelson Rd
Prattville, AL 36097

PAID PREPARER: Ed Jones, P.C.
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:
NAME: James T Johnson
OCCUPATION: Insurance Agent
AGE: 42
Daytime phone #: (334) 220-1912
SSN: 400-00-7408

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TEST # 6 OTHER INFORMATION

SPOUSE:

NAME: Mellissa Johnson
OCCUPATION: Real Estate Agent
Daytime phone #: (334) 227-1091
AGE: 22
SSN: 400-00-7498

FILING STATUS: Married Filing Jointly

NUMBER OF DEPENDENTS: None

ADDRESS: 812 Jasmine Hills Rd
Slapout, AL 36097

RESIDENCY: FULL YEAR
FILED AL RETURN PRIOR YEAR? YES
CURRENT EMPLOYER - Taxpayer: River Oaks Insurance Co
CURRENT EMPLOYER - Spouse: Cardinal Hills Reality Co

No Campaign Contributions

Neighbors Helping Neighbors: NONE

OTHER FED INCOME? NONE

TAXPAYER IRA DEDUCTION: 2000

SPOUSE'S IRA DEDUCTION: 2000

NOTE: NEITHER PRIMARY T/P OR SPOUSE WERE COVERED BY A RETIREMENT PLAN AT WORK.

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ITEMIZED DEDUCTION INFORMATION FOR
ALABAMA SCHEDULE A - ITEMIZED DEDUCTIONS

REAL ESTATE TAXES - Line 5:	750
FICA TAX - Line 6:	See W-2's
OTHER TAXES - Line 8:	800
Qualified mortgage insurance premiums	3000
CONTRIBUTIONS BY CASH OR CHECK - Line 15:	1900

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DONATION CHECK-OFFS

LINE NO. 1a: Senior Services Trust Fund	10
LINE NO. 1b: Alabama Arts Development Fund	10
LINE NO. 1c: Alabama Nongame Wildlife Fund	10
LINE NO. 1d: Child Abuse Trust Fund	10
LINE NO. 1e: Alabama Veterans Program	10
LINE NO. 1f: Alabama Indian Children's Scholarship Fund	10
LINE NO. 1g: Penny Trust Fund	15
LINE NO. 1h: Foster Care Trust Fund	8
LINE NO. 1i: Mental Health	25
LINE NO 1k: AI Breast & Cervical Cancer Program	10
Line NO 1l: AL 4-H Club	10
Line NO 1r: Alabama Firefighter Annuity and Benefit Fund	10

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INTEREST AND DIVIDEND INCOME INFORMATION

Taxable Interest:

COMPANY A	500
COMPANY B	500
COMPANY C	2500
COMPANY D	500

EXEMPT INTEREST:

MUNICIPAL BONDS – MONTGOMERY, AL	3000
MUNICIPAL BONDS – HUNTSVILLE, AL	1000

NOTE: ASSUME MUNICIPAL BONDS ARE ALSO EXEMPT FOR FEDERAL PURPOSES.

Taxable Dividends: None

ALABAMA SCHEDULE CR: CREDIT FOR TAXES PAID TO OTHER STATES

CREDIT ALLOWABLE 672

SOFTWARE DEVELOPERS: PLEASE DEVELOP A WORKSHEET TO BE USED IN YOUR SOFTWARE TO AIDE YOUR CLIENTS IN CALCULATING THE ALABAMA CR. PLEASE FOLLOW THE FORMAT AS SHOWN ON THE ALABAMA SCHEDULE CR FOR LINES 1-5. (PLEASE SEE THE BOTTOM OF ALABAMA SCHEDULE B)

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TEST # 6 W-2 Information

W-2 Block

- a. Control Number:
- b. Employer's ID No: 63-7892433
- c. Employer's Name, Address, and Zip Code:

Cardinal Hills Realty Co
10 Oxford Dr
Letohatchee, AL 35217

- d. Employee SSN: 400-00-7498
- e. Employee's Name, Address and Zip Code:

Mellissa Johnson
812 Jasmine Hills Rd
Slapout, AL 36097

1.	Wages, Tips, and Other Compensation:	65,000.00
2.	Federal Income Tax Withheld:	10640.00
3.	Social Security Wages:	65,000.00
4.	Social Security Tax Withheld:	4,030.00
5.	Medicare Wages and Tips:	65,000.00
6.	Medicare Tax Withheld:	942.00
7.	Social Security Tips:	0
8.	Allocated Tips:	0
9.	Advance EIC Payment:	0
10.	Dependent Care Benefits:	0
11.	Nonqualified Plans:	0
12.	a,b,c,d	N/A
13.	Stat. Employee/Retirement Plan/SickPay	N/A
14.	Other:	N/A
15a.	State:	AL
	Employer's State ID No:	366227
15b.	State:	GA
	Employer's State ID No:	438218
16a.	State Wages:	57,000.00
16b.	State Wages:	8,000.00
17a.	State Income Tax:	3,900.00
17b.	State Income Tax:	380.00

Blocks 18 through 20: Not Applicable

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TEST # 6 W-2 Information

W-2 Block

- a. Control Number:
- b. Employer's ID No: 63-7892432
- c. Employer's Name, Address, and Zip Code:

River Oaks Ins Co
27 Twin Oaks Cir
Clanton, AL 36098

- d. Employee SSN: 400-00-7408
- e. Employee's Name, Address and Zip Code:

James T Johnson
812 Jasmine Hills Rd
Slapout, AL 36097

1.	Wages, Tips, and Other Compensation:		45,000.00
2.	Federal Income Tax Withheld:		5,960.00
3.	Social Security Wages:		45,000.00
4.	Social Security Tax Withheld:		2,790.00
5.	Medicare Wages and Tips:		45,000.00
6.	Medicare Tax Withheld:		653.00
7.	Social Security Tips:		0
8.	Allocated Tips:		0
9.	Advance EIC Payment:		0
10.	Dependent Care Benefits:		0
11.	Nonqualified Plans:		0
12.	a,b,c,d		N/A
13.	Stat. Employee/Retirement Plan/SickPay		N/A
14.	Other:		N/A
15.	State:	AL	
	Employer's State ID No:	366201	
16.	State Wages:		45,000.00
17.	State Income Tax:		3,250.00

Blocks 18 through 20: Not Applicable