

**ALABAMA DEPARTMENT OF REVENUE  
TEST SCENARIOS FOR THE 2013  
ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 4**

**FORMS REQUIRED:**

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

**RETURNS NEEDED:**

1 - FEDERAL FORM 1099-R  
1 - W-G CERTAIN GAMBLING WINNINGS  
1 - FEDERAL FORM C: PROFIT OR LOSS FROM BUSINESS (STATUTORY EMPLOYEE)  
1 – W-2 (STATUTORY EMPLOYEE)

**OTHER INFORMATION ABOUT THE TEST:**

MAY IRS DISCUSS THE RETURN WITH PREPARER: NO  
**MAY ALABAMA DISCUSS THE RETURN WITH PREPARER: NO**

**Consumer Use Tax: 500.00**

**TAXPAYER HAS ELECTED TO DIRECT DEBIT:**

**Is this payment from or going through an account that is located outside of the United States? No**

RTN: 218593749  
ACCT#: 195349  
SAVINGS: YES

PREPARER FIRM: Ed Jones, P.C.  
PREPARER SSN: 123-45-6789  
PREPARER EIN: 23-1234567  
PREPARER PHONE: (334) 240-1980  
PREPARER SELF-EMPLOY IND: Yes  
PREPARER ADDRESS: 50 North Ripley St.  
Montgomery, AL 36132

PAID PREPARER: Ed Jones, PC  
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:  
NAME: Louis Millski  
OCCUPATION: White Water Rafting Guide (Statutory Employee)  
Daytime phone #: (334) 242-1010  
AGE: 37  
SSN: 400-00-7404

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**TEST # 4 OTHER INFORMATION**

FILING STATUS: Head of Family  
NAME OF QUALIFYING PERSON: John Millski  
SSN OF QUALIFYING PERSON: 400-00-7484  
RELATIONSHIP OF QUAL PERSON: Son  
NUMBER OF DEPENDENTS: 4

ADDRESS: 143 Fox Trot Holler  
Montgomery, AL 36132

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY 1  
ALABAMA REPUBLICAN PARTY 0

RESIDENCY: FULL YEAR  
FILED AL RETURN PRIOR YEAR? YES  
CURRENT EMPLOYER: Coosa Ridge Rafting Co

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX:

4/13	575
6/13	575
9/13	575
1/14	575

ESTIMATE PAYMENTS OF FED INCOME TAX: 10000

ALIMONY RECEIVED: 3600

BUSINESS INCOME OR LOSS – FED SCH C 49600

TOTAL PENSIONS AND ANNUITIES: 500

TAXABLE PENSIONS AND ANNUITIES: 500

OTHER INCOME: W – 2 G GAMBLING WINNINGS 4935

SELF-EMPLOYED HEALTH INSURANCE DEDUCTION 630

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**ITEMIZED DEDUCTION INFORMATION FOR  
ALABAMA SCHEDULE A - ITEMIZED DEDUCTIONS**

MEDICAL AND DENTAL EXPENSES - Line 1:	1700
REAL ESTATE TAXES - Line 5:	104
FICA TAX - Line 6:	5967
OTHER TAXES - Line 8: Personal Property	50
HOME MORTGAGE INTEREST REPORTED ON FEDERAL	2340
HOME MORTGAGE INTEREST NOT REPORTED ON FEDERAL FORM 1098 - Line b:	1800
Joe Jones Wetumpka, Al 36092 SSN: 401-22-0001	
POINTS NOT REPORTED ON FORM 1098 - Line 12:	150
CONTRIBUTIONS BY CASH OR CHECK - Line 15:	1200
CONTRIBUTIONS OTHER THAN CASH OR CHECK - Line 16:	99
CONTRIBUTION CARRYOVER FROM PRIOR YEAR - Line 17:	0
OTHER MISC DEDUCTIONS - Line 25: GAMBLING LOSS	4935

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**DEPENDENT INFORMATION**

DEPENDENT NO. 1

DEPENDENT NAME:	John Millski
DEPENDENT SSN:	400-00-7484
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	1996

DEPENDENT NO. 2

DEPENDENT NAME:	Paul Millski
DEPENDENT SSN:	400-00-7474
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	1995

DEPENDENT NO. 3

DEPENDENT NAME:	Richard Millski
DEPENDENT SSN:	400-00-7464
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	1994

DEPENDENT NO. 4

DEPENDENT NAME:	George Millski
DEPENDENT SSN:	400-00-7454
DEPENDENT RELATIONSHIP:	Son
MORE THAN ONE-HALF OF SUPPORT?	YES
BORN:	1993

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**INTEREST AND DIVIDEND INCOME INFORMATION**

**Taxable Interest:**

Bank A	100
Bank B	200
Bank C	300
Bank D	400
Bank E	500
Bank F	600
Bank G	700
Bank H	800

**Taxable Dividends:**

Corp K	10
Corp L	2000
Corp M	150
Corp N	200

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**TEST # 4 1099-R Information**

Payers Name, street address, city, state and zip code:

Ed's Hot Cars Inc  
PO Box 327410  
Montgomery, AL 36109

Payer's Federal ID #: 63-1234568

Recipient's Identification number: 400-00-7404

Recipients Name, address, city, state and zip:

Louis Millski  
143 Fox Trot Holler  
Montgomery, Al 36132

**1099-R Block**

1.	Gross distribution:	500.00
2a.	Taxable amount:	500.00
b.	Total distribution:	yes
3.	Capital gain:	n/a
4.	Federal income tax withheld:	none
5.	Employee contributions:	none
6.	Net unrealized appreciation:	none
7.	Distribution code/IRA/SEP:	7/no
8.	Other:	none
9a-9b.	Your %/Total contributions:	n/a
12.	State tax withheld:	none
13.	State/Payer's state no:	AL 123457
14.	State distribution:	500.00

Lines 15, 16 and 17 N/A

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**TEST # 4 – W - 2G Information**

**W-2G BLOCK:**

Payer's Federal ID No: 63-9876543

State/Payer's telephone number: (334) 280-9000

State/Payer's Name, Address, and Zip Code:

Coosa River Dog Track  
800 Mocasín Gap Pkwy  
Wetumpka, AL 36092

Winner's Name, Address and Zip Code:

Louis Milski  
143 Fox Trot Holler  
Montgomery, Al 36132

1. Gross Winnings:	4935.00
2. Date Won	<b>10/15/2013</b>
3. Type of Wager:	Trifecta
4. Federal Income Tax Withheld:	none
5. Transaction:	05557-D97322
6. Race:	Ellis Park # 5
7. Winnings From Identical Wagers:	none
8. Cashier:	Ms Lucky Streak
9. Winner's Taxpayer Identification No.:	400-00-7404
10. Window:	3002
11. First I.D.:	AL 1264568
12. Second I.D.:	none
13. State/Payer's State Identification No.:	AL 213123456
14. State Winnings	none
15. State Income Tax Withheld:	None

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**TEST # 4 - W-2 Information**

**W-2 Block: Statutory Employee**

- a. Control Number:
- b. Employer's ID No: 63-7218942
- c. Employer's Name, Address, and Zip Code:

Coosa Ridge Rafting Co  
121 West Coosa Rd  
Wetumpka, AL 36092

- d. Employee SSN: 400-00-7404
- e. Employee's Name, Address and Zip Code:

Louis Millski  
143 Fox Trot Holler  
Montgomery, AL 36132

1.	Wages, Tips, and Other Compensation:		78,000.00
2.	Federal Income Tax Withheld:		none
3.	Social Security Wages:		78,000.00
4.	Social Security Tax Withheld:		4836.00
5.	Medicare Wages and Tips:		78,000.00
6.	Medicare Tax Withheld:		1131.00
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	0	
13.	Statutory Employee Box Indicator	yes (checked)	
14.	Other:	N/A	
15.	State:	AL	
	Employer's State ID No:	359001	
16.	State Wages 1:		78,000.00
17.	State Income Tax:		none
18.	Blocks 18 through 20: Not Applicable		