

**ALABAMA DEPARTMENT OF REVENUE  
TEST SCENARIOS FOR THE 2014  
ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 9**

**FORMS REQUIRED:**

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN  
ALABAMA SCHEDULE A - ITEMIZED DEDUCTIONS  
ALABAMA SCHEDULE B – INTEREST AND ORDINARY INTEREST  
ALABAMA SCHEDULE D: INCOME FROM SALE OF REAL ESTATE, STOCKS, ETC.  
ALABAMA SCHEDULE E: INCOME FROM RENTAL REAL ESTATE, ROYALTIES,  
PARTNERSHIPS, S – CORPS, ESTATES AND TRUSTS

**ALABAMA FORM NOL 85: COMPUTATION OF NET OPERATING LOSS**  
**ALABAMA 4952A: INVESTMENT INTEREST EXPENSE DEDUCTION**  
**ALABAMA SCHEDULE NTC: NET TAX CALCULATOR**  
**FEDERAL INCOME TAX DEDUCTION WORKSHEET**

**RETURNS NEEDED:**

- 1 - FEDERAL FORM W-2
- 1 - FEDERAL 1099-R
- 1 - FEDERAL SCHEDULE A: ITEMIZED DEDUCTIONS
- 1 – FEDERAL SCHEDULE C: PROFIT OR LOSS FROM BUSINESS
- 1 - FEDERAL SCHEDULE D: CAPITAL GAINS AND LOSSES
- 1 - FEDERAL SCHEDULE E - INCOME FROM RENTAL REAL ESTATE, ROYALTIES, ECT..
- 1 – FEDERAL FORM: 4952: INVESTMENT INT DED

**OTHER INFORMATION ABOUT THE TEST:**

No Donation check-offs

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

PREPARER FIRM: Jones Accounting  
PREPARER SSN: 123-45-6789  
PREPARER EIN: 23-1234567  
PREPARER PHONE: (334) 555-1212  
PREPARER SELF-EMPLOY IND: YES  
PREPARER ADDRESS: 50 North Ripley St.  
Montgomery, AL 36132  
PAID PREPARER: Ed Jones, P.C.  
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:  
NAME: Harold Jones  
OCCUPATION: Detailer  
Daytime phone #: (334) 555-5555  
AGE: 33  
SSN: 400-00-7410

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**TEST # 9      OTHER INFORMATION**

FILING STATUS: Single  
ALIMONY PAID TO EX-SPOUSE: Yes  
ALIMONY RECIPIENTS NAME, ADDRESS, SSN: Jane Jones  
431 Easy St  
Wetumpka, AL 36092  
SSN: 400-00-7420

NUMBER OF DEPENDENTS: None  
TAX PAYERS'S ADDRESS: 1111 Smith Ave  
Eight Mile, AL 36613

RESIDENCY: FULL YEAR  
FILED AL RETURN PRIOR YEAR? YES  
CURRENT EMPLOYER PRIMARY TAXPAYER: Jimmy's Carwash

FEDERAL SCHEDULE C: -6500  
GAIN OR LOSS FROM SALE OF REAL ESTATE, STOCKS - ETC. -8000  
TAXABLE IRA DISTRIBUTIONS: 2000  
TAXABLE PENSIONS AND ANNUITIES: 2000  
FEDERAL SCHEDULE E: -32500

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

MEDICAL AND DENTAL EXPENSES - Line 1:	1100
REAL ESTATE TAXES - Line 5:	325
FICA TAX - Line 6:	3825
VEHICLE TAX – Line 8:	200
HOME MORTGAGE INTEREST REPORTED ON FEDERAL FORM 1098 - Line 10a:	5500
INVESTMENT INTEREST EXPENSE (AL FORM 4925A):	200
UNREIMBURSED EMPLOYEE EXPENSES - Line 20: MISC BUSINESS EXPENSE	75
OTHER EXPENSES – Line 21:	3000
Safety Deposit Box:	500
Legal Fees:	1000
Accounting Fees	1000
Tax Prep Fees	500
OTHER MISCELLANEOUS DEDUCTIONS - Line 25:	None

**SCHEDULE B – INTEREST AND ORDINARY DIVIDENDS**

**BANK A 200**

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**TEST # 9 - W-2 Information**

**W-2 Block**

- a. Control Number:
- b. Employer's ID No: 63-6000619
- c. Employer's Name, Address, and Zip Code:

Jimmy's Car Wash  
10 Union St  
Montgomery, AL 36130

- d. Employee SSN: 400-00-7410
- e. Employee's Name, Address and Zip Code:

Harold Jones  
1111 Smith Ave  
Eight Mile, AL 36613

1.	Wages, Tips, and Other Compensation:		15,000.00
2.	Federal Income Tax Withheld:		2250.00
3.	Social Security Wages:		15,000.00
4.	Social Security Tax Withheld:		3000.00
5.	Medicare Wages and Tips:		15,000.00
6.	Medicare Tax Withheld:		825.00
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/Sick Pay		None
14.	Other:		
15.	State 1:	AL	
	Employer's State ID No:	359010	
16.	State Wages 1:		15,000.00
17.	State Income Tax1:		500.00

Blocks 18 through 20: Not Applicable

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**TEST # 9 1099- R Information**

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

Mc Donald's Retirement  
202 Brown Ave  
Eight Mile, AL 36613

Payer's Federal ID #: 63-0101010

Recipient's Identification number: 400-00-7410

Recipient's Name, address, city, state and zip:

Harold Jones  
1111 Smith Ave  
Eight Mile, AL 36613

**1099 - R Block**

1.	Gross distribution:	2000.00
2a.	Taxable amount:	2000.00
2b.	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/yes
8.	Other:	none
9a-9b.	Your %/Total contributions:	n/a
12.	State tax withheld:	none
13.	State/Payer's state #:	AL 123456789
14.	State distribution:	2000.00
Lines 15, 16 and 17		N/A