

**ALABAMA DEPARTMENT OF REVENUE
TEST SCENARIOS FOR THE 2010
ALABAMA INDIVIDUAL INCOME TAX RETURN**

TEST # 1

FORMS REQUIRED:

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
ALABAMA SCHEDULE B - INTEREST AND DIVIDEND INCOME

RETURNS NEEDED:

1- FEDERAL W-2
1- FEDERAL 1099-R
1- FEDERAL FORM 3903: MOVING EXPENSES
1- FEDERAL SCHEDULE F: PROFIT OR LOSS FROM FARMING

NOTE: ASSUME ALL FARM EQUIPMENT HAS BEEN FULLY DEPRECIATED

OTHER INFORMATION ABOUT THE TEST:

Part-Year Return

Taxpayer has chosen to claim the standard deduction

MAY IRS DISCUSS THIS RETURN WITH PREPARER: NO
MAY ALABAMA DISCUSS THIS RETURN WITH PREPARER: YES

Is this refund going to or through an account that is located outside of the United States? No

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, P.C.
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:
NAME: Joe P. Jones
OCCUPATION: Revenue Examiner
Daytime phone #: (334) 242-1281
AGE: 35

SSN:

400-00-7401

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TEST # 1 OTHER INFORMATION CONTINUED

FILING STATUS: Single
NUMBER OF DEPENDENTS: NONE
ADDRESS: 101 Madison Ave.
Montgomery, AL 36132

AMOUNT APPLIED TO ALABAMA 2010 ESTIMATED TAX: NONE

TAXPAYER HAS ELECTED TO DIRECT DEPOSIT REFUND:

RTN: 016348251
ACCT#: 71484914
CHECKING: YES

ADDITIONAL FED TAX ON QUALIFIED PLANS, INCLUDING IRAS 500
(PREMATURE DISTRIBUTION ON IRA ACCOUNT), **1040 LINE 58.**

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TEST # 1 OTHER INFORMATION

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY 1
ALABAMA REPUBLICAN PARTY 0

CONSUMER USE TAX: 20

RESIDENCY: PART-YEAR
FILED AL RETURN PRIOR YEAR? YES
CURRENT EMPLOYER: SAME AS ON W-2

TAXPAYER MOVED FROM MOBILE, AL (TO) MONTGOMERY, AL: 150 MILES

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX 2010:

| | |
|------|----|
| 4/10 | 50 |
| 6/10 | 50 |
| 9/10 | 50 |
| 1/11 | 50 |

| | |
|---|------|
| ALIMONY RECEIVED: | 4000 |
| TOTAL IRA DISTRIBUTIONS: | 5000 |
| TAXABLE IRA DISTRIBUTIONS: | 5000 |
| FARM INCOME (SEE FEDERAL SCHEDULE F) | 200 |
| OTHER INCOME: Bingo Winnings | 500 |
| PENALTY ON EARLY WITHDRAWAL OF SAVINGS: | 500 |
| MOVING EXPENSES (SEE FEDERAL FORM 3903) | 1200 |

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TEST # 1 INTEREST AND DIVIDEND INCOME INFORMATION

Taxable Interest:

| | |
|--------|-----|
| Bank A | 25 |
| Bank B | 50 |
| Bank C | 75 |
| Bank D | 100 |
| Bank E | 125 |
| Bank F | 150 |
| Bank G | 175 |
| Bank H | 200 |
| Bank I | 225 |
| Bank J | 10 |
| Bank K | 20 |
| Bank L | 30 |
| Bank M | 40 |
| Bank N | 50 |
| Bank O | 60 |
| Bank P | 70 |
| Bank Q | 80 |
| Bank R | 90 |
| Bank S | 100 |

Taxable Dividends:

| | |
|---------------|-----|
| CORPORATION A | 25 |
| CORPORATION B | 30 |
| CORPORATION C | 35 |
| CORPORATION D | 40 |
| CORPORATION E | 45 |
| CORPORATION F | 50 |
| CORPORATION G | 55 |
| CORPORATION H | 60 |
| CORPORATION I | 65 |
| CORPORATION J | 10 |
| CORPORATION K | 20 |
| CORPORATION L | 30 |
| CORPORATION M | 40 |
| CORPORATION N | 50 |
| CORPORATION O | 60 |
| CORPORATION P | 70 |
| CORPORATION Q | 80 |
| CORPORATION R | 90 |
| CORPORATION S | 100 |

**ALABAMA DEPARTMENT OF REVENUE
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TEST # - 1 - W-2 Information

W-2 Block

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

State of Alabama
10 North Union St.
Montgomery, AL 36130

- d. Employee SSN: 400-00-7401
- e. Employee's Name, Address and Zip Code:

Joe P. Jones
101 Madison Ave.
Montgomery, AL 36132

| | | | |
|-----|--------------------------------------|--------|-----------|
| 1. | Wages, Tips, and Other Compensation: | | 12,000.00 |
| 2. | Federal Income Tax Withheld: | | 3,000.00 |
| 3. | Social Security Wages: | | 12,000.00 |
| 4. | Social Security Tax Withheld: | | 744.00 |
| 5. | Medicare Wages and Tips: | | 12,000.00 |
| 6. | Medicare Tax Withheld: | | 174.00 |
| 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. | N/A | | |
| 14. | Other: | N/A | |
| 15. | State 1: | AL | |
| | Employer's State ID No: | 359000 | |
| 16. | State Wages: | | 12,000.00 |
| 17. | State Income Tax: | | 880.00 |

Blocks 18 through 20: Not Applicable

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TEST # 1

2010 - 1099- R Information

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

Ed's Heavenly Hash, Inc
P.O. Box 7410
Montgomery, Al 36109

Payer's Federal ID #: 63-1234567

Recipient's Identification number: 400-00-7401

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

Joe P. Jones
101 Madison Ave
Montgomery, Al 36132

1099-R Block

| | | | |
|----------------------|------------------------------|-------|-----------|
| 1. | Gross distribution: | | 5,000.00 |
| 2a. | Taxable amount: | | 5,000.00 |
| 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: | 1/yes | |
| 8. | Other: | none | |
| 9ab. | Your %/Total contributions: | N/A | |
| 10. | State tax withheld: | none | |
| 11. | State/Payer's state no: | | AL 123456 |
| 12. | State distribution: | | 5000.00 |
| Lines 13, 14 and 15: | | | N/A |