

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

TEST # 3

FORMS REQUIRED:

- 1 - FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
- 2- ALABAMA SCHEDULE A – ITEMIZED DEDUCTION
- 3- ALABAMA SCHEDULE E: SUPPLEMENTAL INCOME AND LOSS

RETURNS NEEDED:

- 1 - FEDERAL FORM W-2
- 3 - FEDERAL SCHEDULE E: SUPPLEMENTAL INCOME AND LOSS

OTHER INFORMATION ABOUT THE TEST:

Taxpayer filing Married Filing Separately

Must claim Itemized Deduction because husband filed Itemized Deduction

No donation check-offs

No dividend and interest income

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

TAXPAYER HAS ELECTED TO DIRECT DEPOSIT REFUND:

RTN: 117286351
ACCT#: 119871432
CHECKING: 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, P.C.
ADDRESS: SAME AS FIRM ADDRESS

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

GENERAL SALES TAX 2295
HOME MORTGAGE INTEREST 2950

TEST # 3 OTHER INFORMATION

TAXPAYER:

NAME: Vicki Johnson
OCCUPATION: Bar Tender
Daytime phone #: (334) 569-1292
AGE: 29
SSN: 400-00-7403

FILING STATUS: Married Filing Separately
NAME OF QUALIFYING PERSON: Jack Johnson
SSN OF QUALIFYING PERSON: 400-00-7493
RELATIONSHIP OF QUALIFYING PERSON: Spouse

NUMBER OF DEPENDENTS: None

ADDRESS: 123 Adams Ave.
Montgomery, AL 36132

AMOUNT PAID WITH ALABAMA EXTENTION: 300
AMOUNT PAIND WITH FEDERAL EXTENTION: 7500

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY 0
ALABAMA REPUBLICAN PARTY 0

RESIDENCY: FULL YEAR
FILED AL RETURN PRIOR YEAR? YES
CURRENT EMPLOYER: Rich's Bar, LLP
50 Muddy Road
Selma, AI 36492

OTHER FED INCOME? NONE
ESTIMATED PAYMENTS OF ALABAMA INCOME TAX: NONE

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ALIMONY RECEIVED:	0
TOTAL IRA DISTRIBUTIONS:	0
TAXABLE IRA DISTRIBUTIONS:	0
TOTAL PENSIONS AND ANNUITIES:	0
TAXABLE PENSIONS AND ANNUITIES:	0
RENTS, ROYALTIES, PARTNERSHIPS, ESTATES, ETC. (ALABAMA SCHEDULE Es)	10,415
OTHER INCOME:	0
TAXPAYER IRA DEDUCTION:	0
SPOUSE'S IRA DEDUCTION:	0
PYMTS TO KEOGH PLAN/SEP DEDUCTION:	0
PENALTY ON EARLY WITHDRAWAL OF SAVINGS:	0
ALIMONY PAID:	0
ADOPTION EXPENSES:	0
MOVING EXPENSES:	0
SELF-EMPLOYED HEALTH INSURANCE DEDUCTION	0

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TEST # 3 - W-2 Information

W-2 Block

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

Rich's Bar LLP
 50 Muddy Rd
 Selma, AL 36492

- d. Employee SSN: 400-00-7403
- e. Employee's Name, Address and Zip Code:

Vicki Johnson
 123 Adams Ave.
 Montgomery, AL 36132

1.	Wages, Tips, and Other Compensation:	30,000.00	
2.	Federal Income Tax Withheld:	4,000.00	
3.	Social Security Wages:	30,000.00	
4.	Social Security Tax Withheld:	1,860.00	
5.	Medicare Wages and Tips:	30,000.00	
6.	Medicare Tax Withheld:	435.00	
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		N/A
14.	Other:		N/A
15.	State:	AL	
	Employer's State ID No:	359000	
16.	State Wages 1:		30,000.00
17.	State Income Tax:		1900.00

Blocks 18 through 20: Not Applicable