

## TaxSlayer Pro Example Tax Returns

### **Exercise Number Eight – Affordable Care Act Forms**

**Forms Included on Return:** Form 1040, W-2, 1099-R, 1099-SSA, Form 1095-A, Form 8962

*Client's Social Security Number* 259-68-6970  
*Filing Status* Married Filing Joint  
*Taxpayer's Date of Birth* 03/01/1964  
*Spouse's Date of Birth* 01/15/1967  
*Neither Taxpayer nor Spouse is Blind or Deceased*

*Client's First Name, Initial, and Last Name* Samuel E. Adams  
*Secondary First Name, Initial, and Last Name* Patricia R. Adams  
*Secondary SSN* 258-12-3456

*Street Address* 420 Virginia Avenue  
*Zip Code* 30906 (Augusta, Georgia)  
*Daytime Telephone* 706-863-6541  
*Taxpayer's Occupation* Security  
*Secondary's Occupation* Daycare  
*Home Phone* 706-868-1057; *Cell Phone* 706-799-7324; *E-Mail:* samadams@yahoo.com

### **No Dependent Information to enter on return**

**Health Insurance Information:** Taxpayer and spouse had minimum essential health care coverage for the entire year.  
Health coverage was purchased through HEALTHCARE.GOV (marketplace)

**W-2 information:** **Taxpayer**  
Employer ID – 11-3770022  
Employer Name – District Court  
Employer Address – 22380 Starks Drive  
Employer Zip Code – 30809  
Box 1 Wages: \$2,201.00  
Fed. Tax Withheld: \$58.00  
State – Georgia; State ID 113770201; State Wages \$2201; State Withholding \$94  
  
Employer ID – 27-1124521  
Employer Name – Dynamic Industries  
Employer Address – 3955 Pinnacle Road  
Employer Zip Code – 30907  
Box 1 Wages: \$40,000  
Fed. Tax Withheld: \$4,968  
State – Georgia; State ID 271124521; State Wages \$40,000; State Withholding \$1,890

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**W-2 information:      Spouse**

Employer ID – 27-1124521

Employer Name – Dynamic Industries

Employer Address – 3955 Pinnacle Road

Employer Zip Code – 30907

Box 1 Wages:                \$7,820

Fed. Tax Withheld:      \$578

State – Georgia; State ID 271124521; State Wages \$7,820; State Withholding \$332

**1099-R Information**

*1099-R is for the Taxpayer*

*EIN of Payer:*                                38-2365278

*Payer's Name and Address:*    Police Retirement System  
500 Woodward Ave  
Evans, GA 30809

*Gross Distribution:*                        \$26,213

*Taxable Amount:*                            0.00

*Federal Tax Withheld:*                    0.00

*Distribution Code:*                        **3**

*State:*    GA

*State ID:*                                      382365278

*No State Tax Withheld*

*1099-R is for the Taxpayer*

*EIN of Payer:*                                38-2094455

*Payer's Name and Address:*    Public School Retirement System  
P O Box 30172  
Evans, GA 30809

*Gross Distribution:*                        \$3,669

*Taxable Amount:*                            \$3,669

*Federal Tax Withheld:*                    0.00

*Distribution Code:*                        **7**

*State:*    GA; *State ID:*    382094455; *State Tax Withheld* \$156

*\*\*\* The 1099-R is NOT from an IRA*

**Social Security Benefits**

**Spouse's** Net SS Benefits from 1099-SSA      \$8,870

Federal Tax Withheld from 1099-SSA          \$1,331

**Form 1095-A Amounts Received from Healthcare.gov (The Marketplace)**

Taxpayer and Spouse are on the same policy...the policy began in March...the Monthly Premium Amount was \$1,418 for each month beginning in March...The Monthly Premium Amount of the Second Lowest Cost Silver Plan was \$1,270 for each month beginning in March...The Monthly Advance Payment of the Premium Tax Credit was \$799 for each month...you will enter these amounts for each month to calculate **Form 8962**.