# Tax Year 2012 VITA/TCE Sample Questions

**Developed by:** Wisconsin Department of Revenue

Wisconsin Department of



### **Section 1 - Exercises**

### **Exercise 1 - Charles Brick**

Charles Brick, 35, works full-time as bricklayer. He found out at a VITA site last year that he could use the federal and state easy forms instead of the long forms he had been filing for the last ten years.

#### Charles provided the following information:

- Social Security No .... 999-99-XXXX
- Address ...... 1339 Ryan Road, Oak Creek Wisconsin 53154
- Telephone ..... 608-266-2772
- Filing Status ..... Single
- Exemptions:

» Charles cannot be claimed as a dependent on another person's return

- » He does not have any dependents
- Income:

» Wages	45,000
» Bank interest	1,250

- Credits ..... None

#### Additional information:

- Oak Creek is a city located within Milwaukee County
- Charles paid \$6,600 rent for the year. The landlord paid the heating bills.
- Charles purchased a pair of binoculars from an out-of-state Internet retailer because, as everyone knows, most out-of-state Internet retailers don't charge sales tax. He paid \$1,400 for the binoculars plus \$30 for shipping and handling. The retailer did not collect sales or use tax.

#### **Requirements:**

- 1. Complete Wisconsin Form 1
- 2. Comment on Charles opinion of out-of-state Internet retailers

### **Exercise 2 - Darrel and Darcey Daredevil**

#### Darrel and Darcey provided the following information:

- Social Security Number .... 123-99-XXXX and 456-99-XXXX
- Telephone ..... 608-266-7879
- Filing Status ..... Married filing jointly

•	Exemptions:	<b>Relation</b>	Social Security #	Lived with taxpayer
	» Marty	Uncle	999-99-9989	0 months
	» Midge	Cousin	999-99-9988	12 months

Income:

» Wages (Darcey)1	3,000
» Bank of Bayfield Interest	1,000
» State of Montana Bond Interest	400
» Taxable Pension Income7	7,000
» Gross Social Security Received	0,000
» Taxable Social Security Benefits2	5,500
» Other Income (director's fees)	4,500
Adjustments:	
» Alimony (to SSN #976-54-3221)	8,700
Credits:	None
Tax withheld:	
» Federal1	4,000
» Wisconsin	750

#### Additional information:

- \$35,000 of pension income is from Darrel's Civil Service Pension
- He worked for the Department of Defense from 1961 (he enrolled in the pension fund in 1962) through 2002, a total of 40 years
- The Town of Bayfield is in Bayfield County
- The Daredevils paid \$4,850 of real estate taxes on their personal residence
- Note: they want to increase their federal standard deduction by property taxes paid

#### **Requirements:**

- Complete Wisconsin Form 1
- Do you think the Daredevils should be making estimated tax payments?

### **Section 5 - Exercises**

### **Exercise 3 - Wilma Crabapple**

Wilma Crabapple lost her spouse several years ago and doesn't know where to find him. She has provided you with the following so that you can complete her federal and Wisconsin income tax returns.

#### Wilma provided the following information:

٠	Social Security Number	999-99-XXXX
•	Address	3333 Lodel Lane, Shelbyville Wisconsin 53906

- Telephone ...... 608-267-1030
- Filing Status ..... Married filing separately
- Exemptions ..... Personal exemptions only
- Income:
  - » Wages ..... 55,000
  - » Taxable Interest ..... 1,300
  - » IRA distribution ..... 13,000

- The 1099-R for the IRA distribution shows a Code 1 in box 7 of the form

• Adjustments:

» Educator expense	250
» Other Taxes Additional Tax on IRA	1,300
Subtractions:	
» Edvest (for Bob her nephew)	3,000
» Long-term care insurance	1,250
Tax withheld:	
» Federal	6,750
» Wisconsin	2,700

#### Additional information:

- Wilma paid \$5,000 rent for the year
- The landlord paid the heating bills
- Wilma is under 65 years of age and is employed as a middle school teacher by the Shelbyville School District, which is in Sprungsfield County (Code 9605)
- Wilma goes to school in the summer. She paid tuition of \$2,500 to the University of Wisconsin
- Wilma's husband, Barney, left for work four years ago and never came home. She believes he's living in Chicago but can't prove it. Barney's social security number is 999-99-9986.

#### **Requirements:**

- Complete Wilma's federal and Wisconsin income tax returns
- Wilma wants to know how long she has to wait before she can begin using the single filing status. What advice would you give her?
- Note: For reasons she doesn't want to get into, she is not interested in finding her husband

### **Exercise 4 - Jerry Lewis**

Jerry Lewis is a single taxpayer, who needs helps filing his 2012 income tax returns. This is the first year Jerry is filing using itemized deductions. Jerry has no dependents.

#### Jerry Lewis provided the following information:

- Social Security Number... 123-45-XXXX
- Address ...... 1000 Elm Street, Madison, WI 53713
- Telephone ..... 608-267-8976
- Filing Status..... Single
- Exemptions ..... Personal exemptions only
- Income: » Wages ...... 53,000 » Dividends (both ordinary and qualified) ... 400 » Capital gain distribution..... 600 » Raffle Cash Prize ..... 1,000 Adjustments: » HSA deduction..... 1,500 » Tuition and Fees ..... 2,000 Itemized Deductions: » Mortgage interest paid on home ..... 7,200 » Mortgage insurance premium ..... 850 » Gifts to Charity (Cash donations = \$200) ... 450 » Real Estate tax paid ..... 3,200 Tax withheld:

#### **Requirements:**

Complete Jerry's Wisconsin income tax returns

### **Section 5 - Exercises**

### Exercise 5 -

#### Based on the rent paid for 2012, complete lines 13-15 of Schedule H

- Claimant paid rent for two apartments in March of 2012
- Claimant resided in Apartment #2 in March

#### 2012 rent paid

•	Apt. #1, January-March, \$250.00 per month heat included	750
•	Apt. #2, March-December, \$300.00 per month heat not included	3,000
•	Total 2012 rent	3,750

Answer found on p. 88

### Exercise 6 -

Given the following information calculate the amount of taxes/rent Bernice Spruce may claim on her 2012 Homestead credit claim

#### 2012 property taxes

• 2011 property taxes after First Dollar and Lottery and Gaming credits of \$150 ..... 1,550

#### 2012 payments

January through June, Wisconsin Works	200
July through September, Wisconsin Works	100
November and December, County Relief	200

#### **Calculate Schedule 3**

• What line will she enter this amount on Schedule H?

Answer found on p. 88

### Exercise 7 -

# Calculate Ellen's allowable property taxes for her 2012 Homestead credit claim on the appropriate schedules on Page 3 of Schedule H

- During all of 2012, Sarah owns a duplex (not part of a farm) and one of the two units is her personal residence
- The square footage of each unit is the same and the duplex is located on two acres of land
- Property taxes of \$1,750 (before the Lottery and Gaming credit and after the First Dollar credit) were assessed on the duplex for 2012 and Sarah was allowed a Lottery credit of \$80
- Assessed value of the land is \$8,000
- Assessed value of the improvements is \$28,000

### Exercise 8 -

Given the following information, complete Dennis Dotage's 2012 Homestead credit claim. Complete a Schedule H for Mr. Dotage based on this information and attached rent certificate.

#### Information provided

- Social Security Number ... XXX-XX-8888

- Telephone number ...... (608) 789-0123
- 2012 income:

» Wages	1,200
» Interest income	360
» Total Pension received per Form 1099R	2,475
» Nontaxable portion per Form 1099R	1,675
» Taxable portion of pension per Form 1099R	800
» Social Security benefits (including Medicare)	6,060
» Inheritance	5,000

#### **Additional information**

- He has not received Wisconsin Works payments or county relief during 2012
- He has no dependents and was not claimed as a dependent on anyone else's 2012 federal income tax return
- He resides in a mobile home which he owns and paid a monthly mobile home parking permit fee of \$12.50 in addition to rental of \$100 per month for the land (less than 1 acre) on which his mobile home is located
- Mr. Dotage is a widower who has been a resident of Wisconsin for 25 years

# **Exercise 1 - Charles Brick**

ž	Complete	For the year Jan. 1 or other tax year								
	form using	beginning								
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S Yo	our legal last name		Legal first na				M.I.	Your social security number		
	BRINK		CHAR	-				999-99-XXXX		
	a joint return, spous 1339 RYAN	se's legal last name	Spouse's leg	gal first nar	me		M.I.	Spouse's social security numb	ber	
н		per and street). If you have	a PO Box, see	e page 7.		Apt. no.		Tax district		
								Check below then fill i	in either the na	me of city
Ci	ity or post office OAK CREEK	/		State WI	Zip code	154		village, or town and the at the end of 2012.	e county in whic	h you lived
$B \vdash$				VVI	55	134		-		-
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# Exercise 1 - Charles Brick (continued)

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6 Subtract I	ine 15 fro	om line 14	If line 15 is larger	than line 1	4, fill in 0				40727 .00
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b Check	if 65 or c	older	You +Spou	se =	x \$250 <b>17</b>	b	.00		
c Add lin	es 17a a	and 17b					170		700.00
8 Subtract I	ine 17c f	rom line 16.	If line 17c is large	er than line	16, fill in 0. This is	taxable i	ncome 18		40027 .00
9 Tax (see t	able on	page 38) .					19		2373.00
1 Itemized	deductio	n credit. En	close Schedule 1,	page 4		)	.00		
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Rent pai	d in 2012–	heat not inclu	Ided	.00	f table page 2422	2a	160.00		
b Property	taxes paid	d on home in :	2012	.00	Find credit from table page 25 <b>22</b>	!b	.00		
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<b>a</b> Endang	gered re	sources		f Firefigh	ters memorial	· · ·			
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9 Credit rep	ayments	and other	penalties (see pag	ge 29)			39		.00
Add lines	34 throu	ah 36 and	37k through 39				40		2292.00

<u>р</u> сем 292	
500	.00
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208	.00
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# Exercise 2 - Darrel and Darcey Daredevil

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Page <b>2 of 4</b>	SN 123-99-XXXX	S	DARREL	DAREDEVIL	m 1 Name	12 F
MMAS; <u>NO</u> CENTS						
10372.00	15	nt see page 21 and che	spouse) as a depende	n claim vou (or vour	nmeone else ca	- 1
41828 <sub>.00</sub>	16	, fill in 0	5 is larger than line 14	om line 14. If line 1	otract line 15 fr	6
		x \$700 <b>17a</b>	)	ution: See page 22	emptions (Ca	7
		x \$250 17b				
3300.00						
20520 44	ble income 18					
2200			0			
		ee page 22) <b>21</b>				
					nool property ta	
	.00	Find credit from table page 24 <b>22a</b>	.00	-heat included	Rent paid in 2012-	
		Fire di anno all'h fare are		-heat not included		
	.00	table page 2522b				
	.00		4 is less than \$10,000	ax credit } If line 1	rking families t	3   4
	00					
300.00						
				0		
1900.00						
		.00	30	edit. e 2, page 4	rried couple cro close Schedule	0
		.00	21 <b>31</b>	Schedule CR, line	ner credits from	1 (
		.00	32	aid to another state.	t income tax pa close Schedule	2
.00				and 32	d lines 30, 31, a	3
1900.00	net tax 34	, fill in 0. This is your r	3 is larger than line 29	om line 29. If line 3	otract line 33 fr	4 :
	see page 28) <b>36</b>		ail order, or other ou	due on Internet, n	es and use tax	6
			ases amount owed)			
	.00	ers memorial		sources		
		amily relief		l stadium	-	
	22	Harvest/Feeding Amer.	3,	h		
		ss WI Disaster Relief		und		
	.00					
		Olympics	.00 i Special	is	Aultiple scleros	
.00	.00	Olympics	j openiai	iis	/lultiple scleros	(
	.00 ugh j) ▶ 37k	Total (add lines a throu			·	
.00	.00	Total (add lines a throu 9)	MSAs, etc. (see page 2	, retirement plans,	nalties on IRAs	8

# Exercise 2 - Darrel and Darcey Daredevil (continued)

12 Form 1 ame(s) shown on Form 1 DAREDEVIL	DARREL	Your social sec 123-99	Page <b>3 of</b> 4 curity number <b>9-XXXX</b>
		<u>NO</u> CO	MMAS; <u>NO</u> CENTS
1 Amount from line	40		1900.00
2 Wisconsin tax wit	hheld. Enclose withholding statements 42	750 .00	
3 2012 estimated ta	ax payments and amount		
Federal	.00 x % = 44	.00	
	ration credit. <b>a</b> Schedule FC, line 18 <b>45a</b>		
	b Schedule FC-A, line 13 45b		
	t (see page 31) 46		
	t. Enclose Schedule H or H-EZ 47		
-	and surviving spouses property tax credit 48	22	
	n Schedule CR, line 32. Enclose Schedule CR 49		750
Add lines 42 throu	ugh 49		750 .00
0	than line 41, subtract line 41 from line 50. INT YOU OVERPAID	51	.00
2 Amount of line 51	you want <b>REFUNDED TO YOU</b>	52	.00
3 Amount of line 51 APPLIED TO YO	you want UR 2013 ESTIMATED TAX	.00	
	er than line 41, subtract line 50 from line 41. This is the WE. Paper clip payment to front of return		1150 <sub>.00</sub>
	terest. Fill in exception code-See Sch. U 55 ne 54 (see page 34)	.00	
	allow another person to discuss this return with the department (see partment see partment (see partment see pa	age 34)? Yes Complete th	e following No
nty Designee name		Personal identification	
-	no. ▶ ( )     copies of your federal income tax return and	number (PIN)	r <b>n.</b>
<i>Assemble</i> y gn here	our return (pages 1-4) and withholding state	ments in the order listed	l on page 34.
	law, I declare that this return and all attachments are true, correct, Spouse's signature (if filing jointly, BOTH must sign)		<i>owledge and belief.</i> e phone
)a		(	)
il your return to: tax due refund or no tax due	Wisconsin Department of Revenue PO Box 268, Madison WI 53790-0001 PO Box 59, Madison WI 53785-0001 aimedPO Box 34, Madison WI 53786-0001	For Department Use Only C	
Do Not S	Submit Photocopies		

# Exercise 3 - Wilma Crabapple

Complete form using BLACK INK							
	bur legal last name Legal first name M.I					No	
		WILM			IVI.I.	Your social security number 999-99-XXXX	
If a joint return, spo	use's legal last name	Spouse's leg		ie	M.I.	Spouse's social security number	
Home address (nur	nber and street). If you have	e a PO Box, see	page 7.	Apt. no	-	Tax district	
3333 LOD	EL LN		Otata	7:		Check below then fill in eit	
City or post office	LLE		State WI	Zip code 55555		village, or town and the cou at the end of 2012.	inty in which you lived
Filing status	Check ✓ below			-		City	X Village Town
Single						City, village, or town SHELBYV	ILLE
Married fi	iling joint return	Legal	<b>CD A</b>			County of SPRUNSF	
Fill in spo	iling separate return. puse's SSN above and here	1	ne CRA	BAPPLE	M.I.	School district number Ser	
Head of h	nousehold (see page 8). ck here if married	. If ma	arried, fill in	<u>۸</u>	\ \	Special conditions	- page 61
Print numbe	rs like this $\rightarrow 0/2$	234567	89	Not like	u.:. \		COMMAS; NO CENTS
1		201007					
							<u> </u>
						1	<u> </u>
Form W	-2 wages included in li	ine 1		)	•	1 55000.00	69300.00
Form W 2 State and	-2 wages included in li municipal interest (see	ine 1 e page 9)		)	· · · · · ·		69300.00
Form W 2 State and 3 Capital gai	-2 wages included in li municipal interest (see in/loss addition (see pa	ine 1 e page 9) age 10)		)	· · · · · ·	1 55000.00	69300.00
Form W 2 State and 3 Capital gai	-2 wages included in li municipal interest (see	ine 1 e page 9) age 10)		)	•		69300.00
Form W 2 State and 3 Capital gai	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe	ine 1 e page 9) age 10) nber and amo er additions of	bunt, see n line 4.	page 10.	•	1 55000.00 2 3	.00
Form W 2 State and 3 Capital gai 4 Other addi	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe .00	ine 1 e page 9) age 10) nber and amo er additions ou .00	ount, see n line 4.	page 10.	• •	1 55000.00 2 3	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe .00	age 10)	punt, see n line 4.	page 10. 00	· · · · · · · · · · · · · · · · · · ·	1 55000.00 2 3 	.00 .00
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Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 .umn for lines ax (from Forr	ount, see h line 4. 1 throug n 1040, l	page 10. 00 h 4 ine 10)	• • • • 6 7	1 55000.00 2 3 	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in toda othe 	ine 1 age 9) age 10) mber and amo er additions or .00  umn for lines ax (from Forr st	bunt, see h line 4. 1 throug n 1040, l	page 10. 00 h 4 ine 10)	<ul> <li>→</li> <li>→</li></ul>	1 55000.00 2 3 	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 .00 .00 .00 .00 .00 .00 .00 .00 .0	bunt, see h line 4. 1 throug n 1040, l	page 10. 00 h 4 ine 10) <b>1</b>		1 55000.00 2 3 	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai 11 Other subt	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code num Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 umn for lines ax (from Forr st ee page 12) e page 12) number and a other subtract	bunt, see h line 4. 1 throug n 1040, l	page 10. 00 h 4 ine 10) <b>1</b>		1 55000.00 2 3 	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai 11 Other subt	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 .00 .00 .00 .00 .00 .00 .00 .00 .0	n 1040, l n line 4.	page 10. 00 h 4 ine 10) ine 10) ine page 12. ne 11. 00		1 55000.00 2 3 	.00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai 11 Other subt	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 .00 .00 .00 .00 .00 .00 .00 .00 .0	n 1040, l n line 4.	page 10. 00 h 4 ine 10) ine 10) ine page 12. ne 11. 00		1 55000.00 2 3 	.00 .00 .00 .00 .00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai 11 Other subt	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code num Fill in total othe 	ine 1 age 10) mber and amo er additions or .00 umn for lines ax (from Forr st ee page 12) e page 12) oumber and a other subtract 1500 .00 .00	n 1040, l n ine 4.	page 10. 00 h 4 ine 10) tine 10) tine page 12. ne 11. 00 1	<ul> <li>→</li> <li>→<td>1 55000.00 2 3 </td><td>.00 .00 .00 .00 69300.00</td></li></ul>	1 55000.00 2 3 	.00 .00 .00 .00 69300.00
Form W 2 State and 3 Capital gai 4 Other addi 5 Add the ar 6 Taxable re 7 United Sta 8 Unemploy 9 Social sec 10 Capital gai 11 Other subt 02_11 12 Add lines 6	-2 wages included in li municipal interest (see in/loss addition (see pa tions } Fill in code nun Fill in total othe 	ine 1 age 10) mber and amo er additions or  umn for lines ax (from Forr st ee page 12) page 12) page 12) other subtract 150000 00	n 1040, l n line 4.	page 10. 00 h 4 ine 10) ine 10) ine page 12. ne 11. 00 		1 55000.00 2 3 	69300.00 .00 .00 .00 69300.00

# Exercise 3 - Wilma Crabapple (continued)

012	Form 1 Name CRABAPPLE WILMA	SSN	999-99-XXXX	Page <b>2 of 4</b>
				MMAS; <u>NO</u> CENTS
	Wisconsin income from line 13			
5	Standard deduction. See table on page 45, <b>OR •</b>	1 and check	15	.00
6	If someone else can claim you (or your spouse) as a dependent, see page 2 Subtract line 15 from line 14. If line 15 is larger than line 14, fill in 0			66550.00
7	Exemptions (Caution: See page 22) a Fill in exemptions from your federal return 1 x \$700	17a	<b>700</b> .00	
	<b>b</b> Check if 65 or older You + Spouse = x \$250			
	<b>c</b> Add lines 17a and 17b			700.00
8	Subtract line 17c from line 16. If line 17c is larger than line 16, fill in 0. Thi			
	Tax (see table on page 38)			1122
	Itemized deduction credit. Enclose Schedule 1, page 4			
	Armed forces member credit (must be stationed outside U.S. See page 22)			
	School property tax credit			
	a Rent paid in 2012-heat included Find credit from table page 24.	m 22a	121.00	
	· · · · · · · · · · · · · · · · · · ·			
	b Property taxes paid on home in 2012 table page 25.	22b		
23	Historic rehabilitation credits	23	.00	
4	Working families tax credit         }         If line 14 is less than \$10,000           (\$19,000 if married filing joint), see page 25	24	.00	
5	Certain nonrefundable credits from line 8 of Schedule CR	25	.00	
6	Add credits on lines 20 through 25			121.00
7	Subtract line 26 from line 19. If line 26 is larger than line 19, fill in 0		27	4001.00
8	Alternative minimum tax. Enclose Schedule MT			.00
9	Add lines 27 and 28		29	4001.00
0	Married couple credit. Enclose Schedule 2, page 4 3000			
1	Other credits from Schedule CR, line 21 31 .00			
	Net income tax paid to another state. Enclose Schedule OS			
3	Add lines 30, 31, and 32.		33	.00
	Subtract line 33 from line 29. If line 33 is larger than line 29, fill in 0. This			
	Economic development surcharge. Enclose Schedule EDS			
	Sales and use tax due on Internet, mail order, or other out-of-state purc			
-	If you certify that no sales or use tax is due, check here		▶ <u>X</u>	
87	Donations (decreases refund or increases amount owed)			
	a Endangered resources f Firefighters memorial	· · · · · ·	.00	
	b Packers football stadium 00 g Military family relief	· · · · · · ·	.00	
	c Cancer research00 h Second Harvest/Feedin	ing Amer	.00	
	d Veterans trust fund i Red Cross WI Disaste	er Relief	.00	
	00		.00	
	e Multiple sclerosis j Special Olympics			00
			j) ▶ 37k	
88		es a through		.00 429 .00
38 39	Total (add line	es a through 1300 .00	x .33 = <b>38</b>	

unt from line 40 onsin tax withheld. End estimated tax paymer ed from 2011 return ed income credit. Num	WILMA close withholding statements ats and amount			XXXX
onsin tax withheld. End estimated tax paymer ed from 2011 return ed income credit. Num	close withholding statements			
onsin tax withheld. End estimated tax paymer ed from 2011 return ed income credit. Num	close withholding statements			MMAS; <u>NO</u> CENTS
estimated tax paymened from 2011 return ed from 2011 return	its and amount			4430.00
ed from 2011 return ed income credit. Num		42	2700.00	
ed income credit. Num		43	.00	
			.00	
ral			00	
	<u>.00</u> x <u>%</u> =			
land preservation cred				
estead credit. Enclose	Schedule H or H-EZ	47	.00	
le veterans and surviv	ing spouses property tax cree	dit 48	.00	
r credits from Schedule	e CR, line 32. Enclose Schedul	e CR 49	.00	
ines 42 through 49			50	2700.00
0			51	.00
unt of line 51 you want				.00
unt of line 51 you want LIED TO YOUR 2013 I		53	.00	
			54	1730.00
		55	.00	
Do you want to allow anoth	er person to discuss this return with	the department <i>(see page</i>	34)? Yes Complete the	e following No
Designee's		Phone	Personal identification	
		no. 🕨 ( )	number (PIN)	
	yment credit (see page estead credit. Enclose le veterans and surviv credits from Schedule ines 42 through 49 50 is larger than line at of line 51 you want <b>LED TO YOUR 2013</b> I 50 is smaller than line <b>UNT YOU OWE</b> . Pap rpayment interest. Fill nclude on line 54 (see bo you want to allow anothe Designee's name ►	b Schedule FC-A, line 13 yment credit (see page 31)	b Schedule FC-A, line 13 45b	estead credit. Enclose Schedule H or H-EZ.       47       .00         le veterans and surviving spouses property tax credit       48       .00         credits from Schedule CR, line 32. Enclose Schedule CR       49       .00         ines 42 through 49       .00         50 is larger than line 41, subtract line 41 from line 50.       50         s the AMOUNT YOU OVERPAID       .51         unt of line 51 you want REFUNDED TO YOU       .52         JED TO YOUR 2013 ESTIMATED TAX       .53         .00       50 is smaller than line 41, subtract line 50 from line 41. This is the         UNT YOU OWE. Paper clip payment to front of return       .54         rpayment interest. Fill in exception code - See Sch. U       .55         .00       .00         nclude on line 54 (see page 34)       .00

# Exercise 4 - Jerry Lewis

Cor	mplete	For the year Jan. 1 or other tax year beginning								
	m using ACK INK	ending								
Your le	gal last name NIS		Legal first n				M.I.	Your social security numbe	r	
If a ioin		e's legal last name	Spouse's le		me		M.I.	Spouse's social security nu	imber	
		er and street). If you have	a PO Box, see	e page 7.	Ap	ot. no.		Tax district		
City or	1000 ELM ST           City or post office         State         Zip code						Check below then fill village, or town and t			
MA	DISON			WI	537	13		at the end of 2012.	-	
Filin X	ig status C Single	heck 🗸 below						City village	City Villag	ge Towr
		ng joint return						or town	DISON	
	Married filir	ng separate return.	Legal last nar	me				County of ▶ DAN	NE	
		se's SSN above and ere	I Legal first na	me			M.I.	School district num	ber See page 37	3269
		usehold (see page 8). k here if married		narried, fill ir N above an	n spouse's d full name he	re		Special conditions		
Pri	nt numbers	like this $\rightarrow 0/2$	34567	789	Not I	ike th	is →	Ø147	NO COMMA	S; <u>NO</u> CENTS
	Form W-2	wages included in li	ne 1			- N				
3 (	Capital gain/	loss addition (see pa	ige 10)					200 2		
3 (	Capital gain/	vloss addition (see pa ons } Fill in code num Fill in total othe	uge 10) Iber and am r additions o	ount, see on line 4.	page 10.		· · · · · ·		3	.00
3 (	Capital gain/ Other additic	/loss addition (see pa ons } Fill in code num Fill in total othe .00	age 10) hber and am r additions o .00	ount, see on line 4.	page 10.	.00	· · · · · ·		3	.00
3 ( 4 ( 5 /	Capital gain/ Other additic , Add the amo	/loss addition (see pa ons } Fill in code num Fill in total othe 	age 10) hber and am r additions o .00 mn for lines	ount, see on line 4. 2 s 1 throug	page 10. J	.00	·····		3	.00
3 ( 4 ( 5 / 6 1	Capital gain/ Other additic  Add the amo Faxable refu	/loss addition (see pa ons } Fill in code num Fill in total othe .00 ounts in the right colu nd of state income ta	age 10) ber and am r additions o .00 mn for lines ax (from For	ount, see on line 4. 2 s 1 throug	page 10.  gh 4 line 10)	 	·····	005 005	3	.0
3 ( 4 ( 5 / 6 1 7 (	Capital gain/ Dther additic  Add the amo Faxable refu Jnited State	<pre>/loss addition (see pa ons } Fill in code num Fill in total othe .00</pre>	age 10) ber and am r additions o  mn for lines ax (from For st	ount, see on line 4. 2 s 1 throug rm 1040,	page 10.	<u>.00</u> . 6 . 7	· · · · · · · · · · · · · · · · · · ·		3	.0
3 ( 4 ( 5 / 6 T 7 L 8 L	Capital gain/ Dther additic Add the amo Faxable refu Jnited State Jnemployme	<pre>/loss addition (see pa ons } Fill in code num Fill in total othe .00</pre>	inge 10) aber and am r additions o  mn for lines ax (from For st ee page 12)	ount, see n line 4. 2 s 1 throug m 1040,	page 10.	.00 . 6 . 7 . 8	· · · · · · · · · · · · · · · · · · ·	00 00 00 00 	3	.0
3 ( 4 ( 5 / 6 T 7 ( 8 ( 9 s	Capital gain/ Dther additic Add the amo Taxable refu Jnited State Jnemployme Social securi	Vloss addition (see par ons } Fill in code num Fill in total othe 	nge 10) hber and am r additions o  mn for lines ax (from For st be page 12)	ount, see on line 4. 2 s 1 throug m 1040,	page 10.	.00 . 6 . 7 . 8 . 9	· · · · · · · · · · · · · · · · · · ·	00 00 00 00 	3	.00
3 ( 4 ( 5 / 6 1 7 ( 8 ( 9 S 10 ( 11 (	Capital gain/ Dther additic Add the amo Faxable refu Jnited State Jnemployme Social securi Capital gain/ Dther subtra	<pre>/loss addition (see pa ons } Fill in code num Fill in total othe 0 ounts in the right colu nd of state income ta s government interes ent compensation (see ity adjustment (see p /loss subtraction (see actions } Fill in code p Fill in total of</pre>	inge 10) hber and am r additions o mn for lines (from For st ee page 12) hage 12) page 12) humber and ther subtrace	ount, see n line 4. 2 m 1040, ) amount, r ttions on l	page 10. gh 4 line 10) see page 12 ine 11.		· · · · · · · · · · · · · · · · · · ·	00 00 00 00 	3	.00
3 ( 4 ( 5 / 6 1 7 ( 8 ( 9 S 10 ( 11 (	Capital gain/ Dther additic Add the amo Faxable refut Jnited State Jnemployme Social securi Capital gain/	/loss addition (see particular sectors)         Fill in code num         fill in total othe         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09         .00         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09         .00         .00         .00	inge 10) hber and am r additions o  mn for lines ax (from For st be page 12) hage 12) page 12) humber and ther subtrac 	ount, see n line 4. 2 s 1 throug m 1040, ) amount, ; ttions on l	page 10.	 	· · · · · · · · · · · · · · · · · · ·		3	.00
3 ( 4 ( 5 / 6 1 7 ( 8 ( 9 S 10 ( 11 (	Capital gain/ Dther additic Add the amo Faxable refui Jnited State Jnemployme Social securi Capital gain/ Dther subtra 033	/loss addition (see particular)         fill in code num         fill in total othe         .00         .01         bunts in the right colu         nd of state income tails         s government interest         ent compensation (see         ity adjustment (see particular)         /loss subtraction (see         actions       Fill in code particular)         fill in code particular)	inge 10) her and am r additions of  mn for lines (from For st e page 12)  page 12)  page 12)  page 12)  page 12)   	ount, see n line 4. 2s 1 throug m 1040, 	page 10.	<u>.00</u> .6 .7 .8 .9 .10 2. .00 .11		2 3 00 00 00 00 	3 5	.0
3 ( 4 ( 5 / 6 ] 7 [ 9 5 10 ( 11 ( 12 /	Capital gain/ Dther additic Add the amo Taxable refu Jnited State Jnemployme Social securi Capital gain/ Dther subtra 03 131	/loss addition (see particular sectors)         Fill in code num         fill in total othe         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09         .00	inge 10) hber and am r additions o  mn for lines ax (from For st be page 12) hage 12) page 12) humber and ther subtrac   	ount, see n line 4. 2 s 1 throug m 1040, ) amount, . titions on 1 2 2	page 10.	<u>.00</u> .6 .7 .8 .9 .10 .2 .00 .11			2	.0

Name LEWIS JERRY SSN	123-45-XXXX	Page <b>2 of 4</b>
		MMAS; <u>NO</u> CENTS
sin income from line 13		
d deduction. See table on page 45, <b>OR</b> ▼	ere	
t line 15 from line 14. If line 15 is larger than line 14, fill in 0		46842.00
tions (Caution: See page 22) exemptions from your federal return1x \$700 17a		
sk if 65 or older You +Spouse = x \$250 <b>17b</b>	.00	
lines 17a and 17b		700.00
t line 17c from line 16. If line 17c is larger than line 16, fill in 0. This is taxable ir	ncome 18	46142.00
e table on page 38)		2762.00
d deduction credit. Enclose Schedule 1, page 4	124 .00	
orces member credit (must be stationed outside U.S. See page 22) 21		
property tax credit aid in 2012-heat included .00 Eind credit from		
aid in 2012-heat not included .00 table page 2422a	.00	
ty taxes paid on home in 2012 3200.00 Find credit from table page 2522b	300.00	
rehabilitation credits	.00	
g families tax credit } If line 14 is less than \$10,000 (\$19,000 if married filing joint), see page 25 <b>24</b>	.00	
nonrefundable credits from line 8 of Schedule CR		
dits on lines 20 through 25		424.00
t line 26 from line 19. If line 26 is larger than line 19, fill in 0		
ive minimum tax. Enclose Schedule MT		
25 27 and 28		
couple credit.		
e Schedule 2, page 4 3000		
redits from Schedule CR, line 21 3100		
ome tax paid to another state. 2 Schedule OS		
es 30, 31, and 32		.00
t line 33 from line 29. If line 33 is larger than line 29, fill in 0. This is your net ta	ax <b>34</b>	2338.00
nic development surcharge. Enclose Schedule EDS		.00
nd use tax due on Internet, mail order, or other out-of-state purchases (see p ertify that no sales or use tax is due, check here	page 28) <b>36</b>	.00
ns (decreases refund or increases amount owed)		
ngered resources00 f Firefighters memorial	.00	
ers football stadium00 g Military family relief	.00	
er research	.00	
ans trust fund00 i Red Cross WI Disaster Relief	.00	
ole sclerosis00 j Special Olympics	.00	
Total (add lines a through j	j) ▶ 37k	.00
es on IRAs, retirement plans, MSAs, etc. (see page 29)00	x .33 = <b>38</b>	.00
epayments and other penalties (see page 29)		00

# Exercise 4 - Jerry Lewis (continued)

123-45-XXXX <u>NO</u> COMMAS; <u>NO</u> CENTS 41 2338.00 0.00 .00 .00 .00 .00 .00 .00
41 2338.00 0.00 .00 .00 .00 .00 .00 .00
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51 262.00
52 262.00
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5400
.00
Yes Complete the following.
entification mber (PIN)

12 Form 1	Name	LEVVIS	JERRY	SSN	123-45-XX	Tage 4 01 -
					N	IO COMMAS; NO CENTS
Schedule	e 1 – Iter	mized Deductio	on Credit (see page 22)			
			e 4 of federal Schedule A. See	instructions for e	exceptions 1	.00
2 Interest p	aid from I	line 15 of federal S	chedule A. Do not include inte	rest paid to purc	hase	
			onsin or a residence which is urchase or hold U.S. governn		2	7200.00
						450.00
	-		Schedule A. See instructions			150.00
federally-	declared	disaster	al Schedule A, <u>only</u> if the loss	is directly related	<b>4</b>	.00
Add lines	s 1 through	h 4				7650.00
			ne 15 on page 2 of Form 1			
			more than line 5, fill in 0			
			nd on line 20 on page 2 of For			
			his page with Form 1 if y Credit When Both Spous			
	e 2 – Ma	arried Couple C		es Are Emplo	yed (see pag	e 27)
	e 2 – Ma	arried Couple C	Credit When Both Spous	es Are Emplo	y <b>ed (see pag</b> r spouse's incon	e 27)
When comp I Taxable v Do NOT i	<b>e 2 – Ma</b> leting this wages, sal include de	arried Couple C s schedule, be sur laries, tips, and oth eferred compensati	Credit When Both Spous	es Are Emplo Imn (A) and your (A) YOUF	yed (see pag r spouse's incon RSELF	<b>e 27)</b> ne in column (B)
When comp Taxable v Do NOT i pensions 2 Net profit	<b>e 2 – Ma</b> bleting this wages, sal include de , unemplo t or (loss)	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati syment compensati from self-employm	credit When Both Spous e to fill in your income in colu er employee compensation. on, interest, dividends, on, or other unearned income tent from federal	es Are Emplo Imn (A) and your (A) YOUF	yed (see pag r spouse's incon RSELF	e 27) ne in column (B) (B) SPOUSE
When comp I Taxable v Do NOT i pensions 2 Net profit Schedule	<b>e 2 – Ma</b> bleting this include de , unemplo t or (loss) : ss C, C-EZ	arried Couple C s schedule, be sur laries, tips, and oth eferred compensati syment compensati from self-employm Z, and F (Form 1040	Credit When Both Spous e to fill in your income in colu ler employee compensation. on, interest, dividends, on, or other unearned income	es Are Emplo imn (A) and your (A) YOUF	yed (see pag r spouse's incon RSELF	e 27) ne in column (B) (B) SPOUSE
When comp I Taxable v Do NOT i pensions 2 Net profit Schedule and any o	e 2 – Ma vages, sal include de , unemplo t or (loss) s C, C-EZ other taxa	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati syment compensati from self-employme C, and F (Form 1040 ble self-employme	Credit When Both Spous e to fill in your income in colu er employee compensation. on, interest, dividends, on, or other unearned income tent from federal b), Schedule K-1 (Form 1065),	es Are Emplo imn (A) and you (A) YOUF 12	yed (see pag r spouse's incon RSELF	e 27) ne in column (B) (B) SPOUSE .00
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profit</li> <li>Schedule and any o</li> <li>Combine</li> <li>Add the a plus repa and contri included</li> </ul>	e 2 – Ma bleting this wages, sal include de , unemplo t or (loss) is C, C-EZ other taxa lines 1 ar amounts fr ayment of s inbutions t in line 36,	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati yoyment compensati from self-employme A, and F (Form 1040 ble self-employme and 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and , and any Wisconsi	Credit When Both Spous e to fill in your income in colu- on, interest, dividends, on, or other unearned income ment from federal )), Schedule K-1 (Form 1065), nt or earned income d income	es Are Emplo imn (A) and you (A) YOUF 12	yed (see pag r spouse's incon RSELF	e 27) ne in column (B) (B) SPOUSE .00
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profiti Schedule and any of</li> <li>Combine</li> <li>Add the a plus repa and conti included exclusior</li> </ul>	e 2 – Ma bleting this wages, sal include de , unemplo t or (loss) ' ss C, C-EZ other taxa lines 1 ar amounts fr amounts fr in line 36, h. Fill in the	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati nyment compensati from self-employme c, and F (Form 1040 ble self-employme nd 2. This is earner rom federal Form 1 supplemental uner o secs. 403(b) and , and any Wisconsi e total of these adj	Credit When Both Spous e to fill in your income in colu- er employee compensation. on, interest, dividends, on, or other unearned income tent from federal )), Schedule K-1 (Form 1065), nt or earned income d income 1040, lines 24, 28 and 32, mployment benefits, 1501(c)(18) pension plans,	es Are Emplo Imn (A) and your (A) YOUF 1 2 3	yed (see pag r spouse's incon RSELF	e 27) ne in column (B) (B) SPOUSE .00
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profit</li> <li>Schedule and any o</li> <li>Combine</li> <li>Add the a plus repa and contri included exclusior your or yo</li> <li>Subtract</li> </ul>	e 2 – Ma bleting this wages, sal include de , unemplo tor (loss) ' ss C, C-EZ bther taxa lines 1 ar amounts fr yment of : in line 36, h. Fill in the our spous line 4 fron	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati ryment compensati from self-employme A, and F (Form 1040 ble self-employme and 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and and any Wisconsi e total of these adj e's income n line 3. This is qua	Credit When Both Spous e to fill in your income in colu- ler employee compensation. on, interest, dividends, on, or other unearned income lent from federal )), Schedule K-1 (Form 1065), nt or earned income d income	es Are Emplo Imn (A) and your (A) YOUF 1 2 3 4	oyed (see page           r spouse's incon           RSELF           .00           .00           .00           .00	e 27) ne in column (B) (B) SPOUSE .00 .00
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profit</li> <li>Schedule and any o</li> <li>Combine</li> <li>Add the a plus repa and contri included exclusion your or yo</li> <li>Subtract If less that</li> <li>Compare</li> </ul>	e 2 – Ma bleting this wages, sal include de , unemplo t or (loss) ' ss C, C-EZ other taxa lines 1 ar amounts fr ayment of s in Lines 1 ar in Lines 1 ar in Lines 1 ar anounts fr in Lines 1 ar in Lines 1 ar an ounts fr in Lines	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati ryment compensati from self-employme from self-employme nd 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and and any Wisconsi e total of these adj e's income n line 3. This is qua II in 0	Credit When Both Spous e to fill in your income in colu- on, interest, dividends, on, or other unearned income uent from federal )), Schedule K-1 (Form 1065), nt or earned income	es Are Emplo Imn (A) and your (A) YOUF 1 2 3 4 5	oyed (see page         r spouse's incom         RSELF         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00	e 27) ne in column (B) (B) SPOUSE .00 .00
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profit Schedule and any o</li> <li>Combine</li> <li>Add the a plus repa and contri included exclusion your or yo</li> <li>Subtract If less that</li> <li>Compare Fill in the</li> </ul>	e 2 – Ma leting this wages, sal include de , unemplo t or (loss) ' is C, C-EZ other taxa lines 1 ar amounts fr iyment of s ributions to in line 36, h. Fill in tho our spous line 4 fron an zero, fil t the amounds smaller a	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati yoment compensati from self-employme c, and F (Form 104C , and F (Form 104C c, and F (Form 104C ble self-employme and 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and and any Wisconsi e total of these adj e's income n line 3. This is qua Il in 0 unts in columns (A) mount here. If mo	Credit When Both Spous e to fill in your income in colu- on, interest, dividends, on, or other unearned income ment from federal )), Schedule K-1 (Form 1065), nt or earned income d income	es Are Emplo Imn (A) and your (A) YOUF 1 2 3 4 5	yed (see pag         r spouse's incom         RSELF         .00	e 27) ne in column (B) (B) SPOUSE .00 .00 .00 .00 .00 x .03
<ul> <li>When comp</li> <li>Taxable v Do NOT i pensions</li> <li>Net profit Schedule and any of</li> <li>Combine</li> <li>Add the a plus repa and contr</li> </ul>	e 2 – Ma vages, sal include de , unemplo t or (loss) · s C, C-EZ other taxa lines 1 ar amounts fr uyment of ributions tr	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati syment compensati from self-employme c, and F (Form 1040 ble self-employme and 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and	Credit When Both Spous e to fill in your income in colu- er employee compensation. on, interest, dividends, on, or other unearned income tent from federal )), Schedule K-1 (Form 1065), nt or earned income d income 1040, lines 24, 28 and 32, mployment benefits, 1501(c)(18) pension plans,	es Are Emplo imn (A) and you (A) YOUF 12	yed (see pag r spouse's incon RSELF	e 27) ne in column (B)
Taxable v Do NOT i pensions Net profit Schedule and any o Combine Add the a plus repa and contr included exclusion your or y Subtract If less tha Compare Fill in the Rate of c	e 2 – Ma bleting this wages, sal include de , unemplo tor (loss) ' es C, C-EZ other taxa lines 1 ar amounts fr hyment of - ributions ta in Line 36, h. Fill in the our spous line 4 fron an zero, fill e the amou smaller a credit is .00	arried Couple C s schedule, be sur laries, tips, and oth ferred compensati yyment compensati from self-employme A, and F (Form 1040 ble self-employme nd 2. This is earned rom federal Form 1 supplemental uner o secs. 403(b) and , and any Wisconsi e total of these adj te's income n line 3. This is qua ll in 0 unts in columns (A) imount here. If mo 3 (3%)	Credit When Both Spous e to fill in your income in colu- on, interest, dividends, on, or other unearned income uent from federal )), Schedule K-1 (Form 1065), nt or earned income	es Are Emplo imn (A) and your (A) YOUF 1 2 3 4 5 0	yed (see pag         r spouse's incon         RSELF         .00	e 27) ne in column (B) (B) SPOUSE .00 .00 .00 .00

### Exercise 5 -

Та		
	xes and/or Rent See pages 11 to 14.	
	Check here if your home was located on more than one acre of land and was not part of a farm; see Schedule 1, page 3	3.
	Check here if your home was located on more than one acre of land and was part of a farm.	
L	Check here if your home was used for purposes other than personal or farm use while you lived there in 2012; see Scher	dule 2, page 3.
L	Check here if you received Wisconsin Works (W2) payments or county relief during 2012; see Schedule 3, page 3.	
13	Homeowners – Net 2012 property taxes on your homestead, whether paid or not	.00
<u>14</u>	Renters-Rent from your rent certificate(s), line 13a (or Shared Living Expenses Schedule). See pages 12 to 14.	
	Heat included (13b of rent certificate is "Yes") 14a 500 .00 x .20 (20%) = 14b	100 .00
	Heat not included (13b of rent certificate is "No") 14c 3000 .00 x .25 (25%) = 14d	750 .00
15	Total of lines 13, 14b, and 14d (or amount from line 6 of Schedule 3)	850 .00
	Don't delay your refund: ATTACH 2012 tax bill(s) (or closing statement) and/or original rent certificate(s).	
Cro	Don't delay your refund: ATTACH 2012 tax bill(s) (or closing statement) and/or original rent certificate(s). ATTACH ownership document (if the tax bill lists names other than yours). See predit Computation	
	ATTACH ownership document (if the tax bill lists names other than yours). See p	bage 12.
16	ATTACH ownership document (if the tax bill lists names other than yours). See pedit Computation	bage 12.
Cro 16 17 18	ATTACH ownership document (if the tax bill lists names other than yours). See pedit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460	.00
16 17	ATTACH ownership document (if the tax bill lists names other than yours). See predit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)	.00 .00

### Exercise 6 -

Schedule 3 Taxes/Rent Reduction – Wisconsin W	orks (W2) or County Relief Recipients	
Complete this schedule if, for any month of 2012, you received a) Wisconsin Works (W2) payments of any amount, or b) county relief payments of \$400 or more. If you received	<ol> <li>Homeowners – fill in the net 2012 property taxes on your homestead or the amount from line 3 of Schedule 2</li> </ol>	1550
hese payments for all 12 months of 2012, do not complete Schedule H; you do not qualify for homestead credit. Example: You received Wisconsin Works payments for 4 months in 2012. Rent paid for 2012 was \$4,500, and heat	2 Renters – if heat <b>was</b> included, fill in 20% (.20), or if heat <b>was not</b> included, fill in 25% (.25), of rent from line 13a of the rent certificate(s) or line 3 of Schedule 2	
was included.	3 Add line 1 and line 2; fill in the <b>smaller</b> of a) the total of lines 1 and 2, or b) \$1,460	1460
2 20% of rent paid (\$4,500 x .20) \$900	4 Divide line 3 by 12	122
<ul> <li>4 Monthly rent (\$900 ÷ 12) \$ 75</li> <li>5 Number of months no Wisconsin Works received</li></ul>	5 Number of months in 2012 for which you did <b>not</b> receive a) any Wisconsin Works (W2) payments, or b) county relief payments of \$400 or more	3
6 Reduced rent (\$75 x 8 months) \$600 In this example, \$600 would be filled in on line 15 of Schedule H.	6 Multiply line 4 by line 5. Fill in here and on line 15 of Schedule H. Do not fill in line 13 or 14	366

### Exercise 7 -

2012 H Jame(s) shown on Schedule H		Your social security nu	Page 3 of 3
Note: Include this page as part of Schedule	H only if Schedule	1, 2, and/or 3 is com	pleted.
Schedule 1 Allowable Taxes – Home on More Tha	n One Acre of Land		
Homeowners: Complete this schedule if your home was	1 Assessed value of la	nd (from tax bill)	8000
on more than one acre of land and was not part of a farm (as defined on page 6 of the instructions). Claim only the	2 Number of acres of la	and	2
property taxes on one acre of land and the buildings on it.	3 Divide line 1 by line 2	2	4000
<b>Renters</b> : If your home was on more than one acre of land and was not part of a farm, do not complete Schedule 1, but	4 Assessed value of im (from tax bill)	nprovements	28000
see exception 4 under "Exceptions: Homeowners and/or	5 Add line 3 and line 4	·····	32000
Renters" (page 14) for instructions.	6 Add line 1 and line 4	(total assessed value)	36000
Do <b>not</b> complete this schedule if your home was part of a farm. You may claim the property taxes on up to 120 acres	7 Divide line 5 by line 6	6	.8889
of land adjoining your home and all improvements on those 120 acres.	8 Net 2012 property ta for line 13 of Schedule	xes (see instructions e H, on pages 11 to 14)	1670
If you wish to use a different method to prorate your property taxes, attach to Schedule H your computation of allowable property taxes.	9 Multiply line 8 by line on line 13 of Schedu Schedule 2 or 3 belo		1484
Schedule 2 Allowable Taxes/Rent – Home Used Pa	artly for Purposes Oth	er Than Farm or Perso	nal Use
Complete this schedule if your homestead (as defined on page 5 of the instructions) was not part of a farm but was used partly for purposes other than personal use while you lived there in 2012. Only the personal portion of your	1 Net 2012 property ta amount from line 9 o (see pages 11 to 14)		1484
property taxes/rent may be claimed.	2 Percentage of homes		50
"Other uses" include part business or rental use where a deduction is allowed or allowable for tax purposes, and a separate unit occupied by others rent free. See para- graph 3 under "Exceptions: Homeowners and/or Renters" (page 13) for examples and additional information.	3 Multiply line 1 by line on line 13, 14a, or 14		50 742

### Exercise 8

#### **Insurance Deduction Worksheet**

(from Schedule H, page 8)

1.	Amount you paid in 2012 for medical care insurance during a period in which you had no employer and were not self-employed
2.	Amount you paid in 2012 for medical care insurance during a period in which you were
	employed and your employer paid a portion of the cost of your insurance
3.	Multiply line 2 by .45 (45%)
4.	Amount you paid in 2012 for medical care insurance during a period in which you were
	an employee and your employer did not contribute toward the cost of your insurance4. <u>1800</u>
5.	Amount you paid for long-term care insurance in 2012
6.	Add lines 1, 3, 4, and 56. <u>3000</u>
7.	Amount you paid for medical care insurance in 2012 while you were self-employed7.

**Note:** the amount from line 6 of this worksheet may be claimed against taxable income reported on line 8 of Schedule H. The amount from line 7 of this worksheet may only be claimed against net income from self-employment.

Wisconsis Department of Department	the signature line (whiteouts, erasures, etc.) will <b>void</b> this an error should be discarded and a new one completed. Go to www.revenue.wi.gov, select "Forms."
Complete lines 1, 3, and 4. Complete line 2 after your landlord fills in lines 6 to 13 and signs.         1 Name	<ul> <li>11 Fill in lines 11a to 11e based on the period of time this rental unit was occupied by this renter. Use the additional columns on lines 11a and 11b only if rent rates changed during the year (see instructions). Do not include amounts received directly from a governmental agency.</li> <li>a Rent collected per month for this rental unit for 2012\$ 100 \$\$\$\$</li> <li>b Number of months this rented to this rented in 2012\$ 122</li> <li>c Total rent collected for this rental unit for 2012\$ 1200</li> </ul>
and check this box. → □ Landlord Fill in lines 6 to 13 and sign and print your name. 6 Name Joe Smith	<ul> <li>d Number of occupants in this rental unit – do not count spouse or children under 18</li> <li>e This renter's share of total 2012 rent\$ 1200</li> <li>12 Value of food and services provided by landlord (this renter's share)\$ 13a Rent paid for occupancy only –</li> </ul>
Address         102 9th Street           Madison, WI 53701           8 Telephone number         XXX-XXX-8888	Subtract line 12 from line 11e       1200         b       Was heat included in the rent?       Yes         C       If a long-term care facility/CBRF/nursing home, check the method used to compute line 13a:
<ul> <li>9 a Is the rental property (line 3) subject to property taxes?</li> <li>X Yes No</li> <li>b If 9a is "No" and you are a sec. 66.1201 municipal housing authority that makes payments in lieu of taxes, check this box. →</li> <li>10a Is this rent certificate for rent of:</li> </ul>	<ul> <li>Standard rate (\$100 per week).</li> <li>Percentage formula (fill in percentage)%.</li> <li>Other method approved by Department of Revenue.</li> <li>Sign I certify that the information shown on this rent certificate</li> </ul>
A mobile or manufactured home?     Yes X No     A mobile or manufactured home site?     Yes No     No     Mobile or manufactured home taxes or municipal permit fees     you collected from this renter for 2012.     S_150	here       is true, correct, and complete to the best of my knowledge.         Image: Signature (by hand) of landlord or authorized representative       1/21/2013         Joe Smith       Date         Name of landlord or authorized representative (print)

Claimant's social security number	Spouse's socia	al security n	umber			Check below village, or to	wn, and i			
Claimant's legal last name	Legal first name				M.I.	at the end of				
DOTAGE Spouse's legal last name	_	DENNIS Spouse's legal first name M		M.I.	-	X City	V	illage _	Town	
Spouse's legal last name	Spouse s legal	liist name			IVI.I.	City, village, or town	MA	DISON		
Current home address (number and street) 678 9TH ST	L.		/	Apt. no.		County of	DAI	NE		
City or post office MADISON		State WI	Zip code 5372	20		Special conditions		] (See pag	ge 7.)	
1a What was your age as of Decer	mber 31, 2012? (If yo	ou were un	der 18, you	do not	qualify	for homestead c	redit for 20	12.) <b>1a</b>	Fill in age	▶ 71
<b>b</b> If your spouse was age 65 or ov	ver as of December	31, 2012	, check wh	nere inc	dicated	I		1b	Check her	e 🕨 🚬
2 Were you a legal resident of Wi	isconsin from 1-1-12	through	12-31-12?	lf "N	o," you	ı do not qualify	)	2	XYes	No
3 Were you claimed or will you be	e claimed as a deper	ndent on	someone e	else's 2	2012 fe	ederal income	ax return	?		
(If "Yes" and you were under a	-		-						Yes	X No
4a Are you now living in a nursing nursing home name and addres									Yes	X
<b>b</b> If "Yes," are you receiving medi-	cal assistance under	r Title XIX	(? (If both 4	4a and 4	4b are					No
5 Did you becomemarried										X No
		,						·		
6a If married for any part of 2012,	ala you alla your spo	ouse maii	ntain separ	rate ho	omes d	luring any part	of the yea	ar?		
(If "Yes," see page 15.)								ar? <b>6a</b>	Yes	L No
<ul> <li>6a If married for any part of 2012, (If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> </ul>	ned separate homes	while ma	arried durin	ng 2012	2, did e	either spouse r		6a		
<ul><li>(If "Yes," see page 15.)</li><li>b If you and your spouse maintain the other of their marital proper</li></ul>	ned separate homes ty income? (See pag	while mage 15.)	arried durin	ng 2012	2, did e	either spouse r		6a	L Yes	
<ul> <li>(If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> <li>rint numbers like this → 0 1</li> </ul>	ned separate homes ty income? (See pag 23456789	while mage 15.)	arried durin <u>Not</u> like	ng 2012 e this	2, did e → Ø	either spouse r	otify	6a 6b <u>NO</u> C	Yes OMMAS; <u>N</u>	No <u>O</u> CENTS
<ul> <li>(If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> <li>rint numbers like this → O I</li> <li>tousehold Income Include all 2</li> <li>Wisconsin income from your</li> </ul>	ned separate homes ty income? (See pag 23456789 2012 income as liste r 2012 income tax	ed below return.	Arried durin <u>Not</u> like 7. If married If you <b>alre</b>	ng 2012 e this ed, inclu eady f	2, did e → Ø ude th <b>filed</b> y	ither spouse r <b>147</b> e incomes of rour tax returr	poth spou	6a 6b <u>NO</u> Cu uses. See	<u>Yes</u> OMMAS; <u>N</u> pages 7 to	<u>Nc</u> 0 CENTS 11.
<ul> <li>(If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> <li>rint numbers like this → 0 1</li> <li>lousehold Income Include all 2</li> <li>Wisconsin income from your attach a copy marked "Du</li> <li>a If you or you and your spouse</li> </ul>	ned separate homes ty income? (See pag 23456789 2012 income as lister r 2012 income tax plicate." (See pag se are not filing a	ed below return. ge 5, Par	Arried durin <u>Not</u> like If married If you <b>alre</b> rt C.1, par	e this ed, inclu eady f ragrap	2, did $\phi$ → $\emptyset$ ude th <b>filed</b> y oh 3.)	either spouse r 147 e incomes of rour tax return	poth spou	6a 6b <u>NO</u> Cu uses. See	<u>Yes</u> OMMAS; <u>N</u> pages 7 to	<u>Nc</u> 0 CENTS 11.
<ul> <li>(If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> <li>rint numbers like this → 0 1</li> <li>lousehold Income Include all 2</li> <li>Wisconsin income from your attach a copy marked "Du</li> <li>B If you or you and your spous taxable income on lines 8a</li> </ul>	ned separate homes ty income? (See pag 23456789 2012 income as lister r 2012 income tax plicate." (See pag se are not filing a and 8b.	ed below return. 2012 W	<u>Not</u> like <u>.</u> If married If you <b>alre</b> rt C.1, par isconsin r	e this ed, inclue ragrap return,	2, did e → Ø ude th <b>filed</b> y oh 3.) , fill in	e incomes of l our tax return Wisconsin	poth spou	6a 6b <u>NO</u> C <sup>0</sup> uses. See . 7	Yes OMMAS; <u>N</u> pages 7 to	<u>0</u> CENTS 11. .0
<ul> <li>(If "Yes," see page 15.)</li> <li>b If you and your spouse maintain the other of their marital proper</li> <li>rint numbers like this → 0 I</li> <li>lousehold Income Include all 2</li> <li>Wisconsin income from your attach a copy marked "Du</li> <li>B you or you and your spous taxable income on lines 8a</li> <li>a Wages 1200.00</li> </ul>	and separate homes ty income? (See page 23456789 2012 income as lister r 2012 income tax plicate." (See page se are not filing a and 8b. + Interest	ed below return. ge 5, Par 2012 W 360	<u>Not</u> like <u>I</u> If married If you <b>alre</b> rt C.1, par isconsin r <u>.00</u> + E	e this ed, inclu eady f ragrap return, Divide	2, did e → Ø ude th <b>filed</b> y oh 3.) , fill in	e incomes of l our tax return Wisconsin	poth spou	6a 6b <u>NO</u> C <sup>0</sup> uses. See . 7	Yes OMMAS; <u>N</u> pages 7 to	<u>o</u> cents 11. .0
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### Exercise 8 - continued

Cre 16 17 18		16       -         17       -         18       -         19       -         t of my important	450.00 45.00 405.00 324.00
Cre 6 7 8 9	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)         Homestead credit – Using the amount on line 18, fill in the credit from Table B (page 18)         If you file a Wisconsin income tax return, attach this claim behind Form 1, 1A, or 1NPR. Fill in your homestead credit (line 19) on line 32 of Form 1A; line 47 of Form 1; or line 72 of Form 1NPR.         (If filing Form 1 or Form 1NPR, ATTACH a complete copy of your federal income tax return and schedules.) You cannot file Form WI-Z with a homestead credit claim.         er penalties of law, I declare this homestead credit claim and all attachments are true, correct, and complete to the best Claimant's signature	urs). S 16 - 17 - 18 - 19 -	450.00           45.00           405.00           324.00
Cre 6 7 8 9	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)         Homestead credit – Using the amount on line 18, fill in the credit from Table B (page 18)         If you file a Wisconsin income tax return, attach this claim behind Form 1, 1A, or 1NPR. Fill in your homestead credit (line 19) on line 32 of Form 1A; line 47 of Form 1; or line 72 of Form 1NPR.         (If filing Form 1 or Form 1NPR, ATTACH a complete copy of your federal income tax return and schedules.) You cannot file Form WI-Z with a homestead credit claim.	urs). S	450.00 45.00 405.00 324.00
Cre 6 7 8	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)         Homestead credit – Using the amount on line 18, fill in the credit from Table B (page 18)         If you file a Wisconsin income tax return, attach this claim behind Form 1, 1A, or 1NPR. Fill in your homestead credit (line 19) on line 32 of Form 1A; line 47 of Form 1; or line 72 of Form 1NPR.         (If filing Form 1 or Form 1NPR, ATTACH a complete copy of your federal income tax return and	urs). s	450.00 45.00 405.00
<u>Cre</u> 6 7 8	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)         Homestead credit – Using the amount on line 18, fill in the credit from Table B (page 18)         If you file a Wisconsin income tax return, attach this claim behind Form 1, 1A, or 1NPR. Fill in	urs). s	450.00 45.00 405.00
<u>Cre</u> 6 7 8	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)         Homestead credit – Using the amount on line 18, fill in the credit from Table B (page 18)	urs). s	450.00 45.00 405.00
Cre 6 7 8	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)         Subtract line 17 from line 16 (if line 17 is more than line 16, fill in 0; no credit is allowable)	urs). s	450.00 45.00 405.00
6 7	ATTACH ownership document (if the tax bill lists names other than yo         edit Computation         Fill in the smaller of (a) amount on line 15 or (b) \$1,460         Using the amount on line 12c, fill in the appropriate amount from Table A (page 17)	urs). S	450.00 45.00
Cre	ATTACH ownership document (if the tax bill lists names other than yo edit Computation Fill in the smaller of (a) amount on line 15 or (b) \$1,460	urs). S	Gee page 12. 450 <sub>.00</sub>
Cre	ATTACH ownership document (if the tax bill lists names other than yo	urs). S	See page 12.
	ATTACH ownership document (if the tax bill lists names other than yo		
5			
5			
	Total of lines 13, 14b, and 14d (or amount from line 6 of Schedule 3)	15	450.00
	Heat not included (13b of rent certificate is "No")		450
	Heat included (13b of rent certificate is "Yes") 14a00 x .20 (20%) =		
14	Renters-Rent from your rent certificate(s), line 13a (or Shared Living Expenses Schedule). See pages 12		
3	Homeowners – Net <b>2012</b> property taxes on your homestead, whether paid or not	-	150.00
_			150
	Check here if you received Wisconsin Works (W2) payments or county relief during 2012; see Schedule 3, p		
	Check here if your home was used for purposes other than personal or farm use while you lived there in 2012	see S	chedule 2, page 3.
	Check here if your home was located on more than one acre of land and was not part of a farm.	ne i, pi	496 J.
18	xes and/or Rent See pages 11 to 14. Check here if your home was located on more than one acre of land and was not part of a farm; see Schedu		200 3
	be Household income. Subtract line 12b from line 12a (if \$24,680 or more, no credit is allowed)		
	Number of qualifying dependents. Do not count yourself or your spouse (see page 11) x \$500 =	_	
2 ;	a Subtotal. Add lines 11a through 11i	12a	8535.00
i	Other depreciation, Section 179 expense, depletion, amortization, and intangible drilling costs	11i	.00
I	n Car or truck depreciation (standard mileage rate)	-	
	Section 179 expense, depletion, amortization, and intangible drilling costs. If none was claimed, write "None" on federal Schedule E, Part II, near the entity's name	11g _	.00
9	g Partner's, LLC member's, and S corporation shareholder's distributive share of depreciation,		
	and nontaxable Native American income	11f _	.00
1	<ul> <li>Income of nonresident spouse or part-year resident spouse; nontaxable income from sources outside Wisconsin; resident manager's rent reduction; clergy housing allowance;</li> </ul>		
	• Net operating loss carryforward and capital loss carryforward	11e _	.00
	d Other capital gains not taxable	_	
	Gain from sale of home excluded for federal tax purposes (see instructions)	_	
	<b>b</b> Workers' compensation, income continuation, and loss of time insurance (e.g., sick pay)	11b _	
_	a Enter amount from line 10 here	11a _	8535.00

### Section 8 - Department of Revenue Customer Service Contact Information For VITA/TCE Site Coordinators

### For VITA/TCE Site Coordinators Only

### **Outreach Coordinator - Tommie Jones**

 Phone
 608-261-5236

 Email
 tommie.jones@revenue.wi.gov

### **Addresses to Mail Returns**

**Note:** Electronic filing is free, secure, accurate and taxpayers get their refunds within three to five days. A paper return can take up to 12 weeks to process.

WI Form	Refund	Balance Due
Form 1 or Form 1A (Cannot include Schedule H)	Wisconsin Department of Revenue PO Box 59 Madison, WI 53785-0001	Wisconsin Department of Revenue PO Box 268 Madison, WI 53790-0001
Homestead Credit (includes all returns with Schedule H attached)	Wisconsin Department of Revenue PO Box 34 Madison, WI 53786-0001	Wisconsin Department of Revenue PO Box 34 Madison, WI 53786-0001
Form WRA and attachments for electronic filing requirement		P.O. Box 8977 Madison, WI 53708-8977
Electronic Return Payments		Electronic Return Payments Wisconsin Department of Revenue PO Box 930208 Milwaukee WI 53293-0208
IRS Form	Refund	Balance Due
Form 1040	Department of the Treasury Internal Revenue Service Fresno, CA 93888-0002	Department of the Treasury Internal Revenue Service PO Box 802501 Cincinnati, OH 45280-2501

Wisconsin Department of



Tax Year 2012 VITA/TCE Sample Questions

Wisconsin Department of Revenue