

**JEREMY BROWN SCENARIO 1**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 100-00-1234 JEREMY BROWN	BIRTH DATE : 02/22/1995
ADDRESS : 25 CALL ROAD	PREPARER : 995
: ROCHESTER NY 14620	
Phone #1: (585) 223-2323	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

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LISTING OF FORMS FOR THIS RETURN

FORM 1040EZ  
FORM W-2  
FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
NY STATE RESIDENT RETURN

**\* QUICK SUMMARY \***

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<u>SUMMARY</u>	<u>FEDERAL</u>	<u>NY RESIDENT</u>
FILING STATUS	1	1
TOTAL INCOME	22000	22000
TOTAL ADJUSTMENTS	0	0
ADJUSTED GROSS INCOME	22000	22000
DEDUCTIONS	6300	3100
EXEMPTIONS	0	0
TAXABLE INCOME	15700	18900
TAX	1898	898
CREDITS	0	0
PAYMENTS	2200	1200
EARNED INCOME CREDIT	0	0
REFUND	302	302
AMOUNT DUE	0	0

**\* W-2 INCOME FORMS SUMMARY \***

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<u>T/S EMPLOYER</u>	<u>WAGES</u>	<u>FED WITH</u>	<u>FICA</u>	<u>MED TAX</u>	<u>STATE WITH ST</u>
1. T WEGMANS FOOD M	22000	2200	1364	319	1200 NY
TOTALS.....	22000	2200	1364	319	1200

**JEREMY BROWN SCENARIO 2**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 100-00-1234 JEREMY BROWN	BIRTH DATE : 02/22/1995
ADDRESS : 79 SUMMER LANE : ROCHESTER NY 14626	PREPARER : 995
Phone #1: (585) 223-2323	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

LISTING OF FORMS FOR THIS RETURN

FORM 1040EZ  
 FORM W-2  
 FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
 NY STATE RESIDENT RETURN

**\* QUICK SUMMARY \***

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	22000	22000
TOTAL ADJUSTMENTS	0	0
ADJUSTED GROSS INCOME	22000	22000
DEDUCTIONS	6300	7900
EXEMPTIONS	4000	0
TAXABLE INCOME	11700	14100
TAX	1298	575
CREDITS	0	0
PAYMENTS	2200	1200
EARNED INCOME CREDIT	0	0
REFUND	902	625
AMOUNT DUE	0	0

**\* W-2 INCOME FORMS SUMMARY \***

T/S EMPLOYER	WAGES	FED WITH	FICA	MED TAX	STATE WITH ST
1. T WEGMANS FOOD M	22000	2200	1364	319	1200 NY
TOTALS.....	22000	2200	1364	319	1200

**JEREMY BROWN SCENARIO 3**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 100-00-1234 JEREMY BROWN	BIRTH DATE : 02/22/1995
ADDRESS : 79 SUMMER LANE : ROCHESTER NY 14626	PREPARER : 995
Phone #1: (585) 223-2323	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
HENRY WEST	03/12/2008	232-42-5656	OTHER	12
WANDA WEST	03/22/1990	121-12-2222	OTHER	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
FORM W-2  
FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
SHARED RESPONSIBILITY PAYMENT WORKSHEET  
STUDENT LOAN INTEREST DEDUCTION WORKSHEET  
NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	22000	21900
TOTAL ADJUSTMENTS	100	0
ADJUSTED GROSS INCOME	21900	21900
DEDUCTIONS	6300	7900
EXEMPTIONS	12000	2000
TAXABLE INCOME	3600	12000
TAX	363	462
CREDITS	0	0
PAYMENTS	2200	1200
OTHER TAXES	488	0
EARNED INCOME CREDIT	0	0
REFUND	1349	738
AMOUNT DUE	0	0

## JEREMY BROWN SCENARIO 4

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 100-00-1234 JEREMY BROWN	BIRTH DATE : 02/22/1995
SPOUSE : 121-12-2222 WANDA BROWN	BIRTH DATE : 03/22/1990
ADDRESS : 79 SUMMER LANE	PREPARER : 995
: ROCHESTER NY 14626	
Phone #1: (585) 223-2323	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 2	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
HENRY WEST	03/12/2008	232-42-5656	SON	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
 FORM W-2  
 SCHEDULE EIC (EARNED INCOME CREDIT)  
 FORM 8812 (ADDITIONAL CHILD TAX CREDIT)  
 FORM 8867 (EIC CHECKLIST)  
 FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
 SHARED RESPONSIBILITY PAYMENT WORKSHEET  
 STUDENT LOAN INTEREST DEDUCTION WORKSHEET  
 NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	2	2
TOTAL INCOME	22000	21900
TOTAL ADJUSTMENTS	100	0
ADJUSTED GROSS INCOME	21900	21900
DEDUCTIONS	12600	15850
EXEMPTIONS	12000	1000
TAXABLE INCOME	0	5050
TAX	0	123
CREDITS	0	0
PAYMENTS	3200	2458
OTHER TAXES	488	0
EARNED INCOME CREDIT	3359	0
REFUND	6071	2335
AMOUNT DUE	0	0

LATISHA JONES

TAX YEAR: 2015

PROCESS DATE: 08/23/2016

CLIENT : 200-00-2345 LATISHA JONES

BIRTH DATE : 06/30/1975

ADDRESS : 1675 E RIDGE ROAD  
: ROCHESTER NY 14617

PREPARER : 995

Phone #1: (585) 222-2323

PREPARER FEE:

Phone #2: -

ELECTRONIC :

Phone #3: -

TOTAL FEES :

STATUS : 4

FED TYPE: Direct Deposit

ST TYPE : Direct Deposit

E-MAIL :

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
MICHAEL JONES	03/10/2006	301-26-8887	SON	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040A

FORM W-2

SCHEDULE B (INTEREST/DIVIDEND INCOME)

SCHEDULE EIC (EARNED INCOME CREDIT)

FORM 2441 (CHILD CARE CREDIT)

CHILD TAX CREDIT WORKSHEET

FORM 8812 (ADDITIONAL CHILD TAX CREDIT)

FORM 8863 (EDUCATION CREDITS)

FORM 8867 (EIC CHECKLIST)

FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)

FORM 8880 (RETIREMENT SAVINGS CREDIT)

NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	4	4
TOTAL INCOME	30012	30012
TOTAL ADJUSTMENTS	0	0
ADJUSTED GROSS INCOME	30012	30012
DEDUCTIONS	9250	11100
EXEMPTIONS	8000	1000
TAXABLE INCOME	12762	17912
TAX	1278	722
CREDITS	1278	0
PAYMENTS	3400	1970
EARNED INCOME CREDIT	1455	0
REFUND	4855	1248
AMOUNT DUE	0	0

**SUE LAKE**

TAX YEAR: 2015

PROCESS DATE: 08/23/2016

CLIENT : 300-00-3456 SUE LAKE  
SPOUSE : 234-56-7892 MARK LAKE

BIRTH DATE : 05/16/1965  
BIRTH DATE : 06/01/1965

ADDRESS : 75 COLLEGE AVE  
: ROCHESTER NY 14607

PREPARER : 995

Phone #1: (585) 555-1212  
Phone #2: -  
Phone #3: -  
STATUS : 2  
FED TYPE: Direct Deposit  
ST TYPE : Direct Deposit  
E-MAIL :

PREPARER FEE:  
ELECTRONIC :  
TOTAL FEES :

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
SERENA LAKE	08/31/1990	234-56-7891	DAUGHTER	12
MICHAEL LAKE	03/12/1995	123-45-6789	SON	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
FORM W-2  
FORM 1099-G (UNEMPLOYMENT COMPENSATION)  
FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
SCHEDULE B (INTEREST/DIVIDEND INCOME)  
SCHEDULE EIC (EARNED INCOME CREDIT)  
FORM 5329 (TAX ON EARLY RETIREMENT DISTRIBUTIONS)  
FORM 8863 (EDUCATION CREDITS)  
FORM 8867 (EIC CHECKLIST)  
FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
FORM 8965 (HEALTH COVERAGE EXEMPTIONS)  
SHARED RESPONSIBILITY PAYMENT WORKSHEET  
NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	2	2
TOTAL INCOME	39632	39632
TOTAL ADJUSTMENTS	0	0
ADJUSTED GROSS INCOME	39632	39632
DEDUCTIONS	12600	15850
EXEMPTIONS	16000	2000
TAXABLE INCOME	11032	21782
TAX	1103	895
CREDITS	1103	0
PAYMENTS	2400	1354
OTHER TAXES	244	0
EARNED INCOME CREDIT	2179	0
REFUND	4335	459
AMOUNT DUE	0	0

**CLARA POND**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 400-00-4567 CLARA POND	BIRTH DATE : 06/26/1945
ADDRESS : 1106 SO GOODMAN ST : ROCHESTER NY 14620	PREPARER : 995
Phone #1: (585) 723-1234	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Regular Tax	
E-MAIL :	

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
 FORM SSA-1099 (SOCIAL SECURITY BENEFITS)  
 FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
 SCHEDULE A (ITEMIZED DEDUCTIONS)  
 SCHEDULE B (INTEREST/DIVIDEND INCOME)  
 CAPITAL GAIN TAX WORKSHEET  
 FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
 NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	16455	16455
TOTAL ADJUSTMENTS	0	-16332
ADJUSTED GROSS INCOME	16455	123
DEDUCTIONS	10025	9725
EXEMPTIONS	4000	0
TAXABLE INCOME	2430	0
TAX	239	0
CREDITS	0	0
PAYMENTS	1500	300
EARNED INCOME CREDIT	0	0
REFUND	1261	300
AMOUNT DUE	0	0

\* 1099-R INCOME FORMS SUMMARY \*

[T/S]	PAYER	GROSS DIST	TAXABLE AMT	FED WITH	STATE WITH
1.	T MODELL RETIREMENT	15000	15000	1500	300
	TOTALS.....	15000	15000	1500	300

**MARY MARKET**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 500-00-5678 MARY MARKET	BIRTH DATE : 05/16/1975
ADDRESS : 178 COLLEGE HEIGHTS APT 5 : ROCHESTER NY 14626	PREPARER : 995
Phone #1: (585) 555-1212	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 4	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

DEPENDENT NAME	BIRTH DATE	SSN	RELATIONSHIP	MONTHS
DAVID MARKET	03/12/1995	123-45-6789	SON	12
GRACIE JONES MARKET	08/31/2009	234-56-7891	DAUGHTER	12

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
 FORM W-2  
 FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
 SCHEDULE B (INTEREST/DIVIDEND INCOME)  
 SCHEDULE C (BUSINESS INCOME)  
 SCHEDULE EIC (EARNED INCOME CREDIT)  
 SCHEDULE SE (SELF EMPLOYMENT TAX)  
 FORM 2441 (CHILD CARE CREDIT)  
 FORM 5329 (TAX ON EARLY RETIREMENT DISTRIBUTIONS)  
 CHILD TAX CREDIT WORKSHEET  
 FORM 8863 (EDUCATION CREDITS)  
 FORM 8867 (EIC CHECKLIST)  
 FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
 FORM 8962 (PREMIUM TAX CREDIT)  
 NY STATE RESIDENT RETURN

**\* QUICK SUMMARY \***

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	4	4
TOTAL INCOME	39951	39788
TOTAL ADJUSTMENTS	163	0
ADJUSTED GROSS INCOME	39788	39788
DEDUCTIONS	9250	11100
EXEMPTIONS	12000	2000
TAXABLE INCOME	18538	26688
TAX	3169	1245
CREDITS	2629	0
PAYMENTS	2160	1531
OTHER TAXES	426	0
EARNED INCOME CREDIT	985	0
REFUND	2179	286
AMOUNT DUE	0	0



**BETSY SMITH SCENARIO 1**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 600-00-6789 BETSY SMITH	BIRTH DATE : 04/29/1950
ADDRESS : 1106 SO GOODMAN ST APT 3 : ROCHESTER NY 14620	PREPARER : 995
Phone #1: (585) 555-1212	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Regular Tax	
ST TYPE : Direct Deposit	
E-MAIL :	

LISTING OF FORMS FOR THIS RETURN

FORM 1040A  
 FORM SSA-1099 (SOCIAL SECURITY BENEFITS)  
 FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
 SCHEDULE B (INTEREST/DIVIDEND INCOME)  
 CAPITAL GAIN TAX WORKSHEET  
 NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	4572	4572
TOTAL ADJUSTMENTS	0	-4550
ADJUSTED GROSS INCOME	4572	22
DEDUCTIONS	7850	7900
EXEMPTIONS	4000	0
TAXABLE INCOME	0	0
TAX	0	0
CREDITS	0	0
PAYMENTS	0	370
EARNED INCOME CREDIT	0	0
REFUND	0	370
AMOUNT DUE	0	0

\* 1099-R INCOME FORMS SUMMARY \*

	[T/S]	PAYER	GROSS DIST	TAXABLE AMT	FED WITH	STATE WITH
1.	T	MODELL RETIREMENT	4550	4550	0	250
		TOTALS.....	4550	4550	0	250

**BETSY SMITH SCENARIO 2**

TAX YEAR: 2015	PROCESS DATE: 08/23/2016
CLIENT : 600-00-6789 BETSY SMITH	BIRTH DATE : 04/29/1950
ADDRESS : 1106 SO GOODMAN ST APT 3 : ROCHESTER NY 14620	PREPARER : 995
Phone #1: (585) 555-1212	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

LISTING OF FORMS FOR THIS RETURN

FORM 1040  
 FORM SSA-1099 (SOCIAL SECURITY BENEFITS)  
 FORM 1099-R (RETIREMENT DISTRIBUTIONS)  
 SCHEDULE B (INTEREST/DIVIDEND INCOME)  
 SCHEDULE D (CAPITAL GAINS/LOSSES)  
 FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
 FORM 8949 (SALES AND OTHER DISPOSITIONS OF CAPITAL ASSETS)  
 NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	25328	25328
TOTAL ADJUSTMENTS	0	-22123
ADJUSTED GROSS INCOME	25328	3205
DEDUCTIONS	7850	7900
EXEMPTIONS	4000	0
TAXABLE INCOME	13478	0
TAX	1478	0
CREDITS	0	0
PAYMENTS	1750	750
EARNED INCOME CREDIT	0	0
REFUND	272	750
AMOUNT DUE	0	0

\* 1099-R INCOME FORMS SUMMARY \*

	[T/S]	PAYER	GROSS DIST	TAXABLE AMT	FED WITH	STATE WITH
1.	T	MODELL RETIREMENT	4550	4550	0	250
2.	T	LUCKY RETIREMENT	17500	17019	1750	500
		TOTALS.....	22050	21569	1750	750

JOHN WILSON

TAX YEAR: 2015

PROCESS DATE: 09/06/2016

CLIENT : 700-00-7890 JOHN WILSON

BIRTH DATE : 11/11/1980

ADDRESS : 1 MAIN ST APT 5  
: ROCHESTER NY 14611

PREPARER : 995

Phone #1: (585) 333-4444

PREPARER FEE:

Phone #2: -

ELECTRONIC :

Phone #3: -

TOTAL FEES :

STATUS : 1

FED TYPE: Electronic Mail

ST TYPE : Electronic Mail

E-MAIL :

LISTING OF FORMS FOR THIS RETURN

FORM 1040EZ

FORM W-2

FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)

NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

SUMMARY	FEDERAL	NY RESIDENT
FILING STATUS	1	1
TOTAL INCOME	24000	24000
TOTAL ADJUSTMENTS	0	1800
ADJUSTED GROSS INCOME	24000	25800
DEDUCTIONS	6300	7900
EXEMPTIONS	4000	0
TAXABLE INCOME	13700	17900
TAX	1598	799
CREDITS	0	0
PAYMENTS	2400	1683
EARNED INCOME CREDIT	0	0
REFUND	802	884
AMOUNT DUE	0	0

\* W-2 INCOME FORMS SUMMARY \*

T/S	EMPLOYER	WAGES	FED WITH	FICA	MED TAX	STATE WITH	ST
1.	T MONROE CO DSS	24000	2400	1600	374	1200	NY
	TOTALS.....	24000	2400	1600	374	1200	

**HUDSON RIVER**

TAX YEAR: 2015	PROCESS DATE: 09/06/2016
CLIENT : 800-00-8901 HUDSON RIVER	BIRTH DATE : 04/16/1980
ADDRESS : 2715 DEWEY AVE : ROCHESTER NY 14623	PREPARER : 995
Phone #1: (585) 222-1212	PREPARER FEE:
Phone #2: -	ELECTRONIC :
Phone #3: -	TOTAL FEES :
STATUS : 1	
FED TYPE: Direct Deposit	
ST TYPE : Direct Deposit	
E-MAIL :	

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LISTING OF FORMS FOR THIS RETURN

FORM 1040A  
FORM W-2  
FORM 8879 (E-FILE SIGNATURE AUTHORIZATION)  
FORM 8962 (PREMIUM TAX CREDIT)  
FORM 8965 (HEALTH COVERAGE EXEMPTIONS)  
NY STATE RESIDENT RETURN

\* QUICK SUMMARY \*

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<u>SUMMARY</u>	<u>FEDERAL</u>	<u>NY RESIDENT</u>
FILING STATUS	1	1
TOTAL INCOME	31915	31915
TOTAL ADJUSTMENTS	0	0
ADJUSTED GROSS INCOME	31915	31915
DEDUCTIONS	6300	7900
EXEMPTIONS	4000	0
TAXABLE INCOME	21615	24015
TAX	2783	1214
CREDITS	0	0
PAYMENTS	3208	1500
EARNED INCOME CREDIT	0	0
REFUND	425	286
AMOUNT DUE	0	0

\* W-2 INCOME FORMS SUMMARY \*

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<u>T/S EMPLOYER</u>	<u>WAGES</u>	<u>FED WITH</u>	<u>FICA</u>	<u>MED TAX</u>	<u>STATE WITH ST</u>
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