

**ALABAMA DEPARTMENT OF REVENUE  
TEST SCENARIOS FOR THE 2012  
ALABAMA INDIVIDUAL INCOME TAX RETURN**

**TEST # 4**

**FORMS REQUIRED:**

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN  
ALABAMA SCHEDULE A: ITEMIZED DEDUCTIONS  
ALABAMA SCHEDULE B: INTEREST AND DIVIDEND INCOME

**RETURNS NEEDED:**

1 - FEDERAL FORM 1099-R  
1 - W-G CERTAIN GAMBLING WINNINGS  
1 - FEDERAL FORM C: PROFIT OR LOSS FROM BUSINESS (STATUTORY EMPLOYEE)  
1 - W-2 (STATUTORY EMPLOYEE)

**OTHER INFORMATION ABOUT THE TEST:**

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

**Consumer Use Tax: 500.00**

**TAXPAYER HAS ELECTED TO DIRECT DEBIT:**

**Is this payment from or going through an account that is located outside of the United States? No**

RTN: 218593749  
ACCT#: 195349  
SAVINGS: 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, PC  
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:  
NAME: Louis Millski  
OCCUPATION: White Water Rafting Guide (Statutory Employee)  
Daytime phone #: (334) 242-1010  
AGE: 37  
SSN: 400-00-7404

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**TEST # 4 OTHER INFORMATION**

FILING STATUS: Head of Family  
NAME OF QUALIFYING PERSON: John Millski  
SSN OF QUALIFYING PERSON: 400-00-7484  
RELATIONSHIP OF QUAL PERSON: Son  
NUMBER OF DEPENDENTS: 4

ADDRESS: 143 Fox Trot Holler  
Montgomery, AL 36132

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY 1  
ALABAMA REPUBLICAN PARTY 0

RESIDENCY: FULL YEAR  
FILED AL RETURN PRIOR YEAR? YES  
CURRENT EMPLOYER: Coosa Ridge Rafting Co

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX:

|      |     |
|------|-----|
| 4/12 | 575 |
| 6/12 | 575 |
| 9/12 | 575 |
| 1/13 | 575 |

ESTIMATE PAYMENTS OF FED INCOME TAX: 10000

ALIMONY RECEIVED: 3600

BUSINESS INCOME OR LOSS – FED SCH C 49600

TOTAL PENSIONS AND ANNUITIES: 500

TAXABLE PENSIONS AND ANNUITIES: 500

OTHER INCOME: W – 2 G GAMBLING WINNINGS 4935

SELF-EMPLOYED HEALTH INSURANCE DEDUCTION 630

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

|   |      |
|---|------|
| MEDICAL AND DENTAL EXPENSES - Line 1:                                 | 1700 |
| REAL ESTATE TAXES - Line 5:   | 104  |
| FICA TAX - Line 6:  | 5967 |
| OTHER TAXES - Line 8: Personal Property                               | 50   |
| HOME MORTGAGE INTEREST REPORTED ON FEDERAL                            | 2340 |
| HOME MORTGAGE INTEREST NOT REPORTED ON FEDERAL<br>FORM 1098 - Line b: | 1800 |
| Joe Jones<br>Wetumpka, Al 36092<br>SSN: 401-22-0001                   |      |
| POINTS NOT REPORTED ON FORM 1098 - Line 12:                           | 150  |
| CONTRIBUTIONS BY CASH OR CHECK - Line 15:                             | 1200 |
| CONTRIBUTIONS OTHER THAN CASH OR CHECK - Line 16:                     | 99   |
| CONTRIBUTION CARRYOVER FROM PRIOR YEAR - Line 17:                     | 0    |
| OTHER MISC DEDUCTIONS - Line 25: GAMBLING LOSS                        | 4935 |

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**DEPENDENT INFORMATION**

DEPENDENT NO. 1

|                                |              |
|--------------------------------|--------------|
| DEPENDENT NAME:                | John Millski |
| DEPENDENT SSN:                 | 400-00-7484  |
| DEPENDENT RELATIONSHIP:        | Son          |
| MORE THAN ONE-HALF OF SUPPORT? | YES          |
| BORN:                          | 1996         |

DEPENDENT NO. 2

|                                |              |
|--------------------------------|--------------|
| DEPENDENT NAME:                | Paul Millski |
| DEPENDENT SSN:                 | 400-00-7474  |
| DEPENDENT RELATIONSHIP:        | Son          |
| MORE THAN ONE-HALF OF SUPPORT? | YES          |
| BORN:                          | 1995         |

DEPENDENT NO. 3

|                                |                 |
|--------------------------------|-----------------|
| DEPENDENT NAME:                | Richard Millski |
| DEPENDENT SSN:                 | 400-00-7464     |
| DEPENDENT RELATIONSHIP:        | Son             |
| MORE THAN ONE-HALF OF SUPPORT? | YES             |
| BORN:                          | 1994            |

DEPENDENT NO. 4

|                                |                |
|--------------------------------|----------------|
| DEPENDENT NAME:                | George Millski |
| DEPENDENT SSN:                 | 400-00-7454    |
| DEPENDENT RELATIONSHIP:        | Son            |
| MORE THAN ONE-HALF OF SUPPORT? | YES            |
| BORN:                          | 1993           |

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**INTEREST AND DIVIDEND INCOME INFORMATION**

**Taxable Interest:**

|        |     |
|--------|-----|
| Bank A | 100 |
| Bank B | 200 |
| Bank C | 300 |
| Bank D | 400 |
| Bank E | 500 |
| Bank F | 600 |
| Bank G | 700 |
| Bank H | 800 |

**Taxable Dividends:**

|        |      |
|--------|------|
| Corp K | 10   |
| Corp L | 2000 |
| Corp M | 150  |
| Corp N | 200  |

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**TEST # 4 1099-R Information**

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

Ed's Hot Cars Inc  
PO Box 327410  
Montgomery, AL 36109

Payer's Federal ID #: 63-1234568

Recipient's Identification number: 400-00-7404

Recipients Name, address, city, state and zip:

Louis Millski  
143 Fox Trot Holler  
Montgomery, Al 36132

**1099-R Block**

|        |                              |           |
|--------|------------------------------|-----------|
| 1.     | Gross distribution:          | 500.00    |
| 2a.    | Taxable amount:              | 500.00    |
| b.     | 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:   | 7/no      |
| 8.     | Other:                       | none      |
| 9a-9b. | Your %/Total contributions:  | n/a       |
| 10.    | State tax withheld:          | none      |
| 11.    | State/Payer's state no:      | AL 123457 |
| 12.    | State distribution:          | 500.00    |

Lines 13, 14 and 15 N/A

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**TEST # 4 – W - 2G Information**

**W-2G BLOCK:**

Payer's Federal ID No: 63-9876543

State/Payer's telephone number: (334) 280-9000

State/Payer's Name, Address, and Zip Code:

Coosa River Dog Track  
800 Mocasín Gap Pkwy  
Wetumpka, AL 36092

Winner's Name, Address and Zip Code:

Louis Milski  
143 Fox Trot Holler  
Montgomery, Al 36132

|   |                   |
|---|-------------------|
| 1. Gross Winnings:                          | 4935.00           |
| 2. Federal Income Tax Withheld:             | None              |
| 3. Type of Wager:                           | Trifecta          |
| 4. Date Won:                                | <b>10/15/2012</b> |
| 5. Transaction:                             | 05557-D97322      |
| 6. Race:                                    | Ellis Park # 5    |
| 7. Winnings From Identical Wagers:          | none              |
| 8. Cashier:                                 | Ms Lucky Streak   |
| 9. Winner's Taxpayer Identification No.:    | 400-00-7404       |
| 10. Window:                                 | 3002              |
| 11. First I.D.:                             | AL 1264568        |
| 12. Second I.D.:                            | none              |
| 13. State/Payer's State Identification No.: | AL 213123456      |
| 14. State Income Tax Withheld:              | None              |

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**TEST # 4 - W-2 Information**

**W-2 Block : Statutory Employee**

- a. Control Number:
- b. Employer's ID No: 63-7218942
- c. Employer's Name, Address, and Zip Code:

Coosa Ridge Rafting Co  
121 West Coosa Rd  
Wetumpka, AL 36092

- d. Employee SSN: 400-00-7404
- e. Employee's Name, Address and Zip Code:

Louis Millski  
143 Fox Trot Holler  
Montgomery, AL 36132

|     |                                      |               |           |
|-----|--------------------------------------|---------------|-----------|
| 1.  | Wages, Tips, and Other Compensation: |               | 78,000.00 |
| 2.  | Federal Income Tax Withheld:         |               | none      |
| 3.  | Social Security Wages:               |               | 78,000.00 |
| 4.  | Social Security Tax Withheld:        |               | 4836.00   |
| 5.  | Medicare Wages and Tips:             |               | 78,000.00 |
| 6.  | Medicare Tax Withheld:               |               | 1131.00   |
| 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. | Statutory Employee Box Indicator     | yes (checked) |           |
| 14. | Other:                               | N/A           |           |
| 15. | State:                               | AL            |           |
|     | Employer's State ID No:              | 359001        |           |
| 16. | State Wages 1:                       |               | 78,000.00 |
| 17. | State Income Tax:                    |               | none      |
| 18. | Blocks 18 through 20: Not Applicable |               |           |