

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

TEST # 1

FORMS REQUIRED:

FORM 40 ALABAMA INDIVIDUAL INCOME TAX RETURN
ALABAMA SCHEDULE B - INTEREST AND DIVIDEND INCOME

RETURNS NEEDED:

1- FEDERAL W-2
1- FEDERAL 1099-R
1- FEDERAL FORM 3903: MOVING EXPENSES
1- FEDERAL SCHEDULE F: PROFIT OR LOSS FROM FARMING

NOTE: ASSUME ALL FARM EQUIPMENT HAS BEEN FULLY DEPRECIATED

OTHER INFORMATION ABOUT THE TEST:

Part-Year Return

Taxpayer has chosen to claim the standard deduction

MAY IRS DISCUSS THIS RETURN WITH PREPARER: NO
MAY ALABAMA DISCUSS THIS RETURN WITH PREPARER: YES

Is this refund going to or through an account that is located outside of the United States? No

PREPARER FIRM: Ed Jones P.C.
PREPARER SSN: 123-45-6789
PREPARER EIN: 23-1234567
PREPARER PHONE: (334) 240-1980
PREPARER SELF-EMPLOY IND: YES
PREPARER ADDRESS: 50 North Ripley St.
Montgomery, AL 36132

PAID PREPARER: Ed Jones, P.C.
ADDRESS: SAME AS FIRM ADDRESS

TAXPAYER:
NAME: Joe P. Jones
OCCUPATION: Revenue Examiner
Daytime phone #: (334) 242-1281
AGE: 35
SSN: 400-00-7401

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TEST # 1 OTHER INFORMATION CONTINUED

FILING STATUS: Single

NUMBER OF DEPENDENTS: NONE

ADDRESS: 101 Madison Ave.
Montgomery, AL 36132

AMOUNT APPLIED TO ALABAMA 2012 ESTIMATED TAX: NONE

TAXPAYER HAS ELECTED TO DIRECT DEPOSIT REFUND:

RTN: 016348251
ACCT#: 71484914
CHECKING: YES

ADDITIONAL FED TAX ON QUALIFIED PLANS, INCLUDING IRAS 500
(PREMATURE DISTRIBUTION ON IRA ACCOUNT), **1040 LINE 58.**

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TEST # 1 OTHER INFORMATION

ALABAMA ELECTION CAMPAIGN FUND:

ALABAMA DEMOCRATIC PARTY 1
ALABAMA REPUBLICAN PARTY 0

CONSUMER USE TAX: 20

RESIDENCY: PART-YEAR
FILED AL RETURN PRIOR YEAR? YES
CURRENT EMPLOYER: SAME AS ON W-2

TAXPAYER MOVED FROM MOBILE, AL (TO) MONTGOMERY, AL: 150 MILES

OTHER FED INCOME? NONE

ESTIMATED PAYMENTS OF ALABAMA INCOME TAX 2012:

4/12	50
6/12	50
9/12	50
1/13	50

ALIMONY RECEIVED:	4000
TOTAL IRA DISTRIBUTIONS:	5000
TAXABLE IRA DISTRIBUTIONS:	5000
FARM INCOME (SEE FEDERAL SCHEDULE F)	200
OTHER INCOME: Bingo Winnings	500
PENALTY ON EARLY WITHDRAWAL OF SAVINGS:	500
MOVING EXPENSES (SEE FEDERAL FORM 3903)	1200

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TEST # 1 INTEREST AND DIVIDEND INCOME INFORMATION

Taxable Interest:

Bank A	25
Bank B	50
Bank C	75
Bank D	100
Bank E	125
Bank F	150
Bank G	175
Bank H	200
Bank I	225
Bank J	10
Bank K	20
Bank L	30
Bank M	40
Bank N	50
Bank O	60
Bank P	70
Bank Q	80
Bank R	90
Bank S	100

Taxable Dividends:

CORPORATION A	25
CORPORATION B	30
CORPORATION C	35
CORPORATION D	40
CORPORATION E	45
CORPORATION F	50
CORPORATION G	55
CORPORATION H	60
CORPORATION I	65
CORPORATION J	10
CORPORATION K	20
CORPORATION L	30
CORPORATION M	40
CORPORATION N	50
CORPORATION O	60
CORPORATION P	70
CORPORATION Q	80
CORPORATION R	90
CORPORATION S	100

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TEST # - 1 - W-2 Information

W-2 Block

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

State of Alabama
10 North Union St.
Montgomery, AL 36130

- d. Employee SSN: 400-00-7401
- e. Employee's Name, Address and Zip Code:

Joe P. Jones
101 Madison Ave.
Montgomery, AL 36132

1.	Wages, Tips, and Other Compensation:		12,000.00
2.	Federal Income Tax Withheld:		3,000.00
3.	Social Security Wages:		12,000.00
4.	Social Security Tax Withheld:		744.00
5.	Medicare Wages and Tips:		12,000.00
6.	Medicare Tax Withheld:		174.00
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.	N/A		
14.	Other:	N/A	
15.	State 1:	AL	
	Employer's State ID No:	359000	
16.	State Wages:		12,000.00
17.	State Income Tax:		880.00

Blocks 18 through 20: Not Applicable

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2012 - 1099- R Information

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

Ed's Heavenly Hash, Inc
P.O. Box 7410
Montgomery, Al 36109

Payer's Federal ID #: 63-1234567

Recipient's Identification number: 400-00-7401

Recipient's Name, address, city, state and zip:

Joe P. Jones
101 Madison Ave
Montgomery, Al 36132

1099-R Block

1.	Gross distribution:		5,000.00
2a.	Taxable amount:		5,000.00
2b.	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:	1/yes	
8.	Other:	none	
9ab.	Your %/Total contributions:	N/A	
10.	State tax withheld:	none	
11.	State/Payer's state no:		AL 123456
12.	State distribution:		5000.00
Lines 13, 14 and 15:			N/A