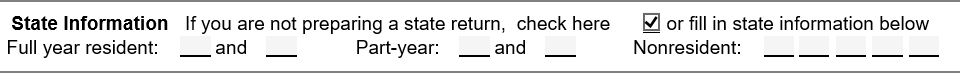
# TaxWise:

1. All returns are Federal ONLY – Main Info Screen State Information section (about half-way down page, below Dependents) should look like this: 

# General Interview Notes (unless specific problem states otherwise):

1. They did not itemize last year
2. They had no interest in, signature authority over, or transactions involving foreign financial accounts; Any refunds or debits do not involve a foreign bank account
3. EIC Wkt Questions:
   1. TP/SP was not a nonresident alien for any part of the year.
   2. TP/SP cannot be a qualifying child of another person for EIC purposes.
   3. No other person can claim any dependent for EIC.
   4. The SSN for all dependents allows them to work and is valid for EIC purposes.
   5. The TP/SP have never had their EIC reduced or disallowed.

# Intake Sheet, Part II, Line 2, To be completed by a Certified Preparer:

1. Is this person a qualifying child/relative of any other person? – No
2. Did this person provide more than 50% of their own support? – No
3. Did this person have less than $4,000 of income? – Yes
4. Did the taxpayer(s) provide more than 50% of support for this person? – Yes
5. Did the taxpayer(s) pay more than half the cost of maintaining a home for this person? - Yes

# Other:

1. NJ is a Medicare Expansion state