

FAM-04 Patterson Scenario

Interview Notes: (See also: General Notes)

1. Fred owns his home in Denville and paid \$9,578.00 in property tax. According to the postcard from the tax office: – Block=50001, Lot-00002, Qualifier is blank.
2. Fred does not have a mortgage on his home.
3. Fred did not receive any property tax rebates in 2012 or 2013.

Documents:



FORM SSA-1099 - SOCIAL SECURITY BENEFIT STATEMENT			
<b style="font-size: 24pt;">2014		<input type="checkbox"/> PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME. <input type="checkbox"/> SEE THE REVERSE FOR MORE INFORMATION.	
Box 1. Name FRED P. PATTERSON		Box 2. Beneficiary's Social Security 741-XX-XXXX	
Box 3. Benefits Paid in 2014 \$12,682.00	Box 4. Benefits Repaid to SSA in	Box 5. Net Benefits Paid for 2014 (Box 3 minus Box 4) \$12,682.00	
DESCRIPTION OF AMOUNT IN BOX 3		DESCRIPTION OF AMOUNT IN BOX 4	
Paid by check or direct deposit \$9,915.20 Medicare Part B premiums deducted from your benefits \$1,258.80 Medicare Prescription Drug premiums (Part D) deducted from your benefits \$240.00 Total Additions \$12,682.00 Benefits for 2014 \$12,682.00		Box 6. Voluntary Federal Income Tax Withheld \$1,268.00	
Benefits for 2013 Benefits for 2012 Benefits for 2011		Box 7. Address FRED P. PATTERSON	
		Box 8. Claim Number (use this number if you need to contact SSA) 741-XX-XXXXA	
Form SSA-1099-SM			

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		a. Employee's social security number 741-XX-XXXX				
b. Employer identification number (EIN) 74-9XXXXXX		1. Wages, tips, other compensation \$14,678.00		2. Federal income tax withheld \$1,468.00		
c. Employer's name, address, city state and ZIP Code FRANCISCAN OAKS 19 POCONO ROAD DENVER, NJ 07834		3. Social security wages \$14,678.00		4. Social security tax withheld \$910.04		
		5. Medicare wages and tips \$14,678.00		6. Medicare tax withheld \$212.83		
		7. Social security tips		8. Allocated tips		
d. Control number		9.		10. Dependant care benefits		
e. Employee's name (first, initial, last), address, city, state and ZIP code FRED P. PATTERSON 3717 BAXTER ST DENVER, NJ 07834		11. Nonqualified plans		12a. See instructions for box 12		
		13. Statutory Employee <input type="checkbox"/> Retiree Plan <input type="checkbox"/> Third-party sickpay <input type="checkbox"/>		12b.		
		14. Other NJFLI \$14.68		12c.		
		NJSUI \$62.38		12d.		
NJSUI \$62.38						
NJSUI \$55.78						
15. State NJ	Employer's state ID number 74-9XXXXXX	16. State wages, tips, etc. \$14,678.00	17. State income tax \$55.00	18. Local wages, tips, etc.	19. Local income tax	20. Locality name
<p>Form W-2 Wage and Tax Statement 2014</p> <p>Copy B - To Be Filed With Employee's FEDERAL Tax Return.</p> <p>This information is being furnished to the Internal Revenue Service.</p>						

<input type="checkbox"/> CORRECTED (if checked)							
PAYER'S name, address, city, state, ZIP code NATIONAL CITY BANK 15 MAIN STREET DENVER, NJ 07834		Payer's RTN (optional)		2014		Interest Income	
		1 Interest income \$1,951.57		Form 1099-INT			
		2 Early withdrawal penalty				Copy B	
PAYER'S Federal identification number 74-8XXXXXX		RECIPIENT'S identification number 741-XX-XXXX		3 Interest on US Savings Bonds and Treas. obligations		For Recipient	
RECIPIENT'S name, address, city, state, and ZIP code FRED P. PATTERSON 3717 BAXTER ST DENVER, NJ 07834		4 Federal income tax withheld		5 Investment expenses		This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported	
		6 Foreign Tax Paid		7 Foreign Country or US possession			
		8 Tax exempt interest		9 Specified private activity bond interest			
		10 Market Discount		11 Bond Premium			
		FATCA filing requirement <input type="checkbox"/>		12		13 Bond Premium on tax-exempt bond	
Account number (see instructions)		14 Tax-exempt and tax credit bond CUSIP no.		15 State		16 State Identification no	
						17 State tax withheld	
Form 1099-INT							