| **Need** | **Line** | **Name** | **F** | **H** | **L** | **R** | **K** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Filing status MFJ MFS HH MFJ MFJ | MFJ | MFJ | HH | QW | MFJ |
|  |  | Age(es) | 77-75 | 78-60 | 46 | 51 | 71-61 |
|  |  | Correction(s) needed to Intake sheet |  |  | X |  |  |
|  |  | Homeowner | X |  |  |  | X |
|  |  | Renter |  | X | X | X |  |
|  |  | Itemized last year | X | X |  |  | X |
|  |  | Taxpayer or Spouse blind |  | X |  |  |  |
|  |  | Taxpayer or Spouse disabled |  |  | X |  |  |
|  |  | Death of Spouse | X |  |  | X |  |
|  |  | Dependents-children | X |  | X | X | X |
|  |  | Dependents-other |  | X |  |  | X |
|  |  | Non-dependent (code 0) |  |  | X |  |  |
|  | 7 | W-2 |  |  | X | X | X |
|  | 7 | W-2 box 7 – SS tips |  |  | X |  |  |
|  | 7 | W-2 box 8 – Allocated tips |  |  | X |  |  |
|  | 7 | W-2 box 14 – Private Plan |  |  | X |  | X |
|  | 7 | W-2 box ?? – Dependent Care |  |  | X |  |  |
|  | 7 | Unreported tips |  |  |  |  |  |
|  | 7 | Cafeteria / 125 Plan |  |  |  | X | X |
|  |  | Brokerage Statement |  | X |  |  | X |
|  | 8 | 1099-INT Stand-alone / Brokerage |  | B | S | S | S&B |
|  | 8 | 1099-INT box 1 – Regular |  | X | X | X | X |
|  | 8 | 1099-INT box 2 – Early penalty |  |  |  |  | X |
|  | 8 | 1099-INT box 3 – Savings Bonds |  | X |  |  | X |
|  | 8 | 1099-INT box 8 – Tax-exempt F & S |  | X |  | X | X |
|  | 8 | 1099-INT box 8 – Tax-exempt F only |  | X |  |  | X |
|  | 8 | K-1 - Interest |  | X |  |  |  |
|  | 8 | 1099-OID - Interest |  |  |  |  |  |
|  | 8 | Owner financed interest |  |  |  |  | X |
|  | 9 | 1099-DIV Stand-alone / Brokerage | B | B |  |  | B |
|  | 9 | 1099-DIV box 1a & 1b – Ord & Qual | X | X |  |  | X |
|  | 9 | 1099-DIV box 2a – Capital Gain | X | X |  |  | X |
|  | 9 | 1099-DIV box 6 – Foreign Tax Paid |  | X |  |  | X |
|  | 9 | 1099-DIV box 10 – Exempt Interest Div |  | X |  |  | X |
|  | 9 | 1099-DIV box 11 – PAB AMT |  | X |  |  | X |
|  | 9 | K-1 – Dividends |  | X |  |  |  |
|  | 10 | 1099-G State Refund – did itemize |  |  | X |  | X |
|  | 10 | 1099-G State Refund – did not use | X |  |  |  |  |
|  | 11 | Alimony received |  |  | X |  |  |
|  | 12 | 1099-MISC box 7 – Nonemployee |  |  | X |  | X |
|  | 12 | Self-employment – cash |  |  |  |  | X |
|  | 12 | Education expense on Sch C |  |  | X |  |  |
|  | 13 | 1099-B Stand-alone / Brokerage |  | B |  |  | B |
|  | 13 | 1099-B - boring |  | X |  |  | X |
|  | 13 | 1099-B – Commission |  |  |  |  |  |
|  | 13 | 1099-B – Wash Sale |  | X |  |  | X |
|  | 13 | 1099-B – Inherited Stock |  | X |  |  | X |
|  | 13 | Consolidate (Code M) on Cap Gn Wkt |  | X |  |  | X |
|  | 13 | Capital Loss Carryover from prior year |  | X |  |  | X |
|  | 13 | K-1 – Capital Gains |  | X |  |  |  |
|  | 13 | Home Sale |  |  |  |  |  |
|  | 15 | 1099-R IRA code 1 |  |  | X |  | X |
|  | 15 | 1099-R IRA code 1 – with 5329 |  |  |  | X |  |
|  | 15 | 1099-R IRA code 7 |  |  |  |  | X |
|  | 15 | 1099-R IRA code G |  |  |  |  | X |
|  | 16 | 1099-R Pension code 3 – Disability |  |  | X |  |  |
|  | 16 | 1099-R Pension code 7 – boring |  |  |  |  |  |
|  | 16 | 1099-R Pension code 7 – Box 2a blank |  | X |  |  |  |
|  | 16 | 1099-R Pension code 7 – Box 2a < Box1 | X |  |  |  |  |
|  | 16 | 1099-R Pension code 7 – DFAS | X |  |  |  | X |
|  | 16 | 1099-R Pension code 7 – Simp Method |  | X |  |  | X |
|  | 16 | 1099-R CSA |  |  |  | X |  |
|  | 16 | 1099-R CSF |  |  |  |  |  |
|  | 16 | 1099-R RRB |  |  |  |  |  |
|  | 17 | K-1 – Royalties |  | X |  |  | X |
|  | 19 | 1099-G Unemployment |  |  |  | X | X |
|  | 20 | SSA-1099 Social Security | X | X |  |  | X |
|  | 20 | SSA-1099 Social Security – Lump Sum |  |  |  |  |  |
|  | 21 | W-2G non-lottery |  |  |  | X |  |
|  | 21 | W-2G lottery <= 10K | X |  |  |  | X |
|  | 21 | W-2G lottery > 10K |  |  |  |  |  |
|  | 21 | Other – Homestead Benefit (not on Sch A) |  |  |  |  |  |
|  | 21 | Other – PTR (not on Sch A) |  |  |  |  |  |
|  | 21 | 1099-C |  |  |  |  | X |
|  | 21 | Other – Jury Duty |  |  |  |  |  |
|  | 21 | 1099-LTC – In scope |  |  |  |  |  |
|  | 21 | 1099-Q – In scope |  |  |  |  |  |
|  | 21 | St Tax Refund – Negative Taxable Income |  |  | X |  |  |
|  | 23 | Educator Expenses |  |  |  |  | X |
|  | 31 | Alimony Paid |  |  |  |  | X |
|  | 32 | IRA Contribution |  |  |  |  | X |
|  | 33 | Student Loan Interest |  |  |  | X | X |
|  | 24 | Tuition and fees |  |  |  |  |  |
|  | 40 | Itemized Deductions | X |  |  |  | X |
|  | 40 | NJ Estimated Payment prior year > 12/31 |  | X |  |  |  |
|  | 40 | NJ Tax owed on prior year return |  | X |  |  |  |
|  | 40 | Extra NJ Sales Tax (e.g. car) | X |  |  |  |  |
|  | 40 | PTR on Sch A | X |  |  |  | X |
|  | 40 | Homestead Benefit on Sch A | X |  |  |  |  |
|  | 46 | Excess APTC repay (8962) |  |  |  |  |  |
|  | 49 | Dependent Care |  |  | X |  | X |
|  | 50 | 1098-T Tuition Statement |  |  |  | X | X |
|  | 53 | Residential Energy |  |  |  |  | X |
|  | 61 | ISRP - yes |  |  |  |  |  |
|  | 60b | Repay new home buyer credit |  |  |  |  |  |
|  | 65 | Estimated Tax Payments - Fed |  |  |  |  | X |
|  | 76 | Refund – Direct Deposit |  |  |  |  | X |
|  | 76 | Refund – Split (8888) |  |  |  |  |  |
|  | 78 | Amount owed – Direct Withdrawal |  |  |  |  |  |
|  |  | 1040-ES worksheet |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **New Jersey** |
|  |  | Domestic Partner |  |  |  |  |  |
|  |  | College Student Exemption |  |  |  |  |  |
|  |  | College Student No Exemption |  |  |  |  |  |
|  |  | Add code 0 dependent (for EIC) |  |  | X |  |  |
|  |  | Dependent w/o Health Insurance |  |  |  |  |  |
|  | 25 | Remove Cancellation of Debt (1099-C) |  |  |  |  | X |
|  | 25 | Remove PTR or Homestead Benefit |  |  |  |  |  |
|  | 30 | Medical Expense – Cafeteria – Easy |  |  |  | X | X |
|  | 30 | Medical Expense – Cafeteria – Hard |  |  |  |  | X |
|  | 45 | NJ Use Tax – Standard Lookup |  | X |  |  | X |
|  | 45 | NJ Use Tax – Items >= $1,000 |  |  |  |  |  |
|  | 50 | Estimated Tax Payments – NJ |  | X |  |  | X |
|  | 5x | Excess UI DI FLI |  |  | X |  |  |
|  |  | Have info for NJ IRA Wkt |  |  |  | X |  |
|  |  | Prepare NJ 1040 ES |  | X |  |  |  |
|  |  |  |  |  |  |  |  |