# DRAFT Scenario

Last Updated: 6/21/2019 for OMB submission

**Scenario:**

*Married (MFJ), wages, taxable interest, over-withholding, two dependents*

**Name:** *Name-2*

**DOB:** *DOB*  
**SS#:** *xxx-xx-xxxx*

**Employment:** *Type of employment*

**Marital Status:** *Married*

**Spouse’s Name**: *Name-3*

People who lived in the house with you and anyone living outside of your home that you or your spouse (if any) supported during the tax year:

**Name SS# DOB Relationship**

Spouse Name xxx-xx-xxxx xx/xx/xxxx Spouse

Child Name xxx-xx-xxxx xx/xx/xxxx Daughter   
Child Name xxx-xx-xxxx xx/xx/xxxx Son

You and your spouse, *Name-3*, are currently employed. You receive income from *name of Employer-2* and spouse received income from *name of Employer-3.* In addition, you receive income in the form of interest from *name of Bank-1.* You have two children who live with you and for whom you provide all their support. You and your family lived in the state of *State Name* for the entire year and are U.S. Citizens.

When it is time to file your income tax return, you and your wife file jointly on the same return.

**Supporting Materials:**

* **W-2s** for both employer: Show $xx total income, show amount $xx amount of Federal income tax withheld; *Note: Over-withholding will result in a refund.*
* **1099:** Show $xx in taxable income, no Federal income tax withheld.
* **Child Tax Credit** – check box on list of dependents, F8812

1. **Itemized deductions --**

You itemized your deductions last year, and you think you may be able to itemize again this year. The following is a summary of the applicable receipts and records for itemizing deductions:

|  |  |
| --- | --- |
| Medical expenses | $1000 |
| Real Estate Taxes on your primary residence | $3750.69 |
| Motor Vehicle Tax (value based) | $92.19 |
| Home Mortgage Interest | $7422.72 |
| Charitable Contributions |  |
| * Checks to local charities | $360 |
| * Clothing donation receipts fair market value | $327 |
| State Refund |  |