

Taxpayer Free File Usability

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:

<u>Name</u>	<u>SS#</u>	<u>DOB</u>	<u>Relationship</u>
Spouse Name Spouse	xxx-xx-xxxx	xx/xx/xxxx	
Child Name	xxx-xx-xxxx	xx/xx/xxxx	Daughter
Child Name Son	xxx-xx-xxxx	xx/xx/xxxx	

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

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(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	