

ALL THE INCOME

Cristiano filled out his IRS intake sheet (pages 2 and 3) as seen below. Take a look at the form and then read the questions on the next page. Use your P+P Volunteer Tax Manual to help find the answers.

Income: Answer the following questions on the left side of this page	Expenses and Tax Related Events: Answer the questions on the right side of this page
Received money from any of the following in 2024:	Paid any of the following expenses to itemize in 2024?
<input checked="" type="checkbox"/> (B) Wages as a part-time or full-time employee How many jobs <u>2</u>	<input type="checkbox"/> (A) Mortgage Interest
<input checked="" type="checkbox"/> (B/A) Tips	<input type="checkbox"/> (A) Taxes: state, local, real estate, sales, etc.
<input type="checkbox"/> (B/A) Retirement account, pension or annuity proceeds	<input type="checkbox"/> (A) Medical, dental, prescription expenses
<input type="checkbox"/> (B) Disability benefits (such as payments from insurance and worker's compensation)	<input type="checkbox"/> (A) Charitable contributions
<input type="checkbox"/> (B) Social Security or Railroad Retirement Benefits	Paid any of these expenses in 2024?
<input checked="" type="checkbox"/> (B) Unemployment benefits	<input type="checkbox"/> (B) Student loan interest
<input checked="" type="checkbox"/> (B) Refund of state or local income tax	<input type="checkbox"/> (B) Child and dependent care
<input type="checkbox"/> (B) Interest or dividends (bank account, bonds, etc.)	<input type="checkbox"/> (B/A) Contributions to a retirement account
<input type="checkbox"/> (A) Sale of stocks, bonds or real estate Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (B) School supplies by a teacher, teacher's aide or other educator
<input type="checkbox"/> (B) Alimony	<input type="checkbox"/> (B) Alimony payments (do not include child support)
<input type="checkbox"/> (A/M) Income from renting out your house or a room in your house If yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days <input type="checkbox"/> Yes <input type="checkbox"/> No	Did any of the following happen during 2024?
<input type="checkbox"/> Income from renting personal property such as a vehicle	<input checked="" type="checkbox"/> (B) You or someone in your family took educational classes (technical school, college, job related, etc.)
<input checked="" type="checkbox"/> (B) Gambling winnings, including lottery	<input type="checkbox"/> (A) Sell a home
<input type="checkbox"/> (A) Payments for contract or self-employment work Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (A) Have a health savings account (HSA)
<input type="checkbox"/> Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits)	<input type="checkbox"/> (A) Purchase health insurance through the Marketplace (Exchange)
	<input type="checkbox"/> (A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)
	<input type="checkbox"/> (A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender
	<input type="checkbox"/> (A) Have a loss related to a declared Federal disaster area
	<input type="checkbox"/> (B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)
	<input type="checkbox"/> Receive any letter or bill from the IRS
	<input type="checkbox"/> (B) Make estimated tax payments or apply last year's refund to 2024 taxes

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1. What tax forms do you expect Cristiano to have to support the answers he gave?

2. What additional interview questions would you ask about Cristiano's answers to questions – "Interests or Dividends", "Refund of State or Local Income Tax" and "You or someone in your family took educational classes"?

3. When Cristiano gets his printed copy of his tax return, what 1040 Schedule will report the gambling winnings?

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Destinee is a college student and filled out her IRS intake sheet (pages 2 and 3) as seen below. Take a look at the forms and then read the questions on the next page. Use your P+P Volunteer Tax Manual to help find the answers.

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Received money from any of the following in 2024:	Paid any of the following expenses to itemize in 2024?
<input type="checkbox"/> (B) Wages as a part-time or full-time employee How many jobs _____	<input type="checkbox"/> (A) Mortgage Interest
<input type="checkbox"/> (B/A) Tips	<input type="checkbox"/> (A) Taxes: state, local, real estate, sales, etc.
<input type="checkbox"/> (B/A) Retirement account, pension or annuity proceeds	<input type="checkbox"/> (A) Medical, dental, prescription expenses
<input type="checkbox"/> (B) Disability benefits (such as payments from insurance and worker's compensation)	<input type="checkbox"/> (A) Charitable contributions
<input type="checkbox"/> (B) Social Security or Railroad Retirement Benefits	Paid any of these expenses in 2024?
<input type="checkbox"/> (B) Unemployment benefits	<input type="checkbox"/> (B) Student loan interest
<input checked="" type="checkbox"/> (B) Refund of state or local income tax	<input type="checkbox"/> (B) Child and dependent care
<input checked="" type="checkbox"/> (B) Interest or dividends (bank account, bonds, etc.)	<input type="checkbox"/> (B/A) Contributions to a retirement account
<input type="checkbox"/> (A) Sale of stocks, bonds or real estate Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (B) School supplies by a teacher, teacher's aide or other educator
<input checked="" type="checkbox"/> (B) Alimony	<input type="checkbox"/> (B) Alimony payments (do not include child support)
<input type="checkbox"/> (A/M) Income from renting out your house or a room in your house If yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days <input type="checkbox"/> Yes <input type="checkbox"/> No	Did any of the following happen during 2024?
<input type="checkbox"/> Income from renting personal property such as a vehicle	<input checked="" type="checkbox"/> (B) You or someone in your family took educational classes (technical school, college, job related, etc.)
<input checked="" type="checkbox"/> (B) Gambling winnings, including lottery	<input type="checkbox"/> (A) Sell a home
<input type="checkbox"/> (A) Payments for contract or self-employment work Did you report a loss on last year's return <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> (A) Have a health savings account (HSA)
<input type="checkbox"/> Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits) ???	<input type="checkbox"/> (A) Purchase health insurance through the Marketplace (Exchange)
	<input type="checkbox"/> (A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)
	<input type="checkbox"/> (A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender
	<input type="checkbox"/> (A) Have a loss related to a declared Federal disaster area
	<input type="checkbox"/> (B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)
	<input type="checkbox"/> Receive any letter or bill from the IRS
	<input type="checkbox"/> (B) Make estimated tax payments or apply last year's refund to 2024 taxes

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HOMEOWNERS/MOBILE HOME OWNERS ONLY

1. Did you or your spouse receive any nontaxable income not listed elsewhere? Do not include child support, SNAP/food assistance, energy assistance or income from a dependent.

- No, I did not receive any additional income
- SSI (Supplemental Security Income) \$_____per month or year
- State benefits (such as MFIP, MSA, GA or Emergency Assistance) \$_____per month or year
- Workers' compensation \$_____per month or year
- Scholarship or grants \$_____per month or year
- Other type of income _____ \$_____per month or year

2. Did you rent out part of your home or use it for business?

- Yes
- No
- Not applicable

3. Do you have your 2025 Property Tax Statement?

- Yes
- No
- Not yet
- Not applicable

4. Did you live with someone who is not listed on your tax return?

- Yes
- No
- Not applicable

1. What tax forms do you expect Destinee to have to support the answers she gave?

2. What types of taxable income do you expect Destinee will report? What types of nontaxable income do you expect?

3. Which of Destinee's answers would prompt you to ask additional interview questions? What would you ask?
