

\_\_\_\_\_ Name

# Case Studies – 1040EZ

1. W2 information for Joseph M. Red

Occupation: Cashier

Joseph M. Red  
615 Poplar Drive, New Town, WI 54444  
SS #999-78-1451

Single  
Not claimed by anyone  
No contribution to election fund

<u>Wages</u>	\$3,250.00
Federal Income Tax Withheld	\$32.00
Interest Income:	\$0.00

Does not qualify for EIC

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2. W2 and 1099-INT information for Susan A. Black

Occupation: Cashier

Susan A. Black  
601 Turnbold Street, Robin, WI 54651  
SS #999-77-4244

Single  
Not claimed by anyone  
No contribution to election fund

<u>Wages</u>	\$9,990
Federal Income Tax Withheld	\$845.00
Interest Income	\$102.68

Does not qualify for EIC

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3. W2 and 1099-INT information for Alice Jones Occupation: Customer Service Rep

Alice S. Jones  
1090 North Avenue, Mukwonago, WI 53149  
SS #555-15-4654

Single  
Not claimed by anyone  
\$3 contribution to election fund

<u>Wages</u>	\$15,687
Federal Income Tax Withheld	\$1180.69
Interest Income	\$263.85

Does not qualify for EIC

**Grade Rubric**

\_\_\_\_\_ Names

Description	Points Possible	Points Earned
Name Information Keyed Correct	5	
Presidential Election Campaign Not Checked	2	
Wages, Salaries, & Tips (Line 1)	2	
Taxable Interest (Line 2)	2	
Adjusted Gross Income (Line 4)	2	
Standard Deduction Check & Amount (Line 5)	2	
Taxable Income (Line 6)	2	
Federal Income Tax Withheld (Line 7)	2	
Total Payments (Line 10)	2	
Tax (Line 11)	2	
Refund Amount (Line 12A)	2	
Occupation	1	
Paid Preparer's Information	1	
<b>Total Points</b>	<b>27</b>	

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Federal Income Tax Withheld (Line 7)	2	
Total Payments (Line 10)	2	
Tax (Line 11)	2	
Refund Amount (Line 12A)	2	
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