



2014 Problems and Exercises

To be used in conjunction with the
IRS Publication 4491 X

- Washington
- Webster

Washington : Additional Information

- Windsor is current with his child support payments. All payments have been made through the NYS Support Collection Unit
- Windsor contributed \$6000 through the NYS 529 college savings plan.
- Windsor was an active firefighter for the entire year with the Yorktown Firehouse.

Washington: TP-301 - NYS Intake Sheet

Name Windsor Washington		Date 02/15/2014		
County Erie	School district West Seneca	Married <input type="checkbox"/>	Single <input checked="" type="checkbox"/>	
New York State			Yes	No
1.	Do you keep records of all your income, expenses and deductions?	X		
2.	Were you (and your spouse if filing a joint return), a New York State resident for the entire tax year? (If No, skip to question 7.)	X		
3.	Did you pay undergraduate college tuition expenses for yourself, your spouse, or your dependents? (IT-272)	X		
4.	Did you pay child support through the support collection unit for at least one-half of the year? (IT-209)	X		
5.	Were you (or spouse) an active volunteer fire fighter or ambulance worker for the entire tax year? (IT-245)	X		
6.	Was your total household income (all individuals living with you) under \$18,000? (IT-214)			X
7.	Did you pay nursing home expenses (special assessment) during the tax year? (IT-258)			X
8.	Did you pay long-term care insurance premiums during the tax year? (IT-249)			X
9.	Was any of your income taxed by another state or local government (IT-112-R) or did you pay taxes to a province of Canada (IT-112-C)?			X
10.	Did you purchase taxable property or services for use in New York State without paying sales and use tax at the time of purchase? (line 59 on IT-201 – do not leave blank)			X
11.	Did you contribute to the NYS retirement system or cafeteria plan during the tax year? (shown in box 14 on your W-2 as 414H or IRC125)?			X
12.	Did you make contributions to a NYS 529 college savings plan during the tax year?			X
13.	Did you earn interest on U.S. government bonds during the tax year?			X
14.	Did you receive pension payments from New York State or a NYS local government, or a federal government pension plan?			X
15.	Are you receiving any pension payments, for work you performed, that are not from NYS, a NYS local government, or the federal government?			X
16.	Are you receiving pension payments as a beneficiary of the pension plan?			X
New York City				

Webster: Additional Information

- Anthony paid \$1800 toward his long-term Care Insurance
- Courtney paid \$26,000 to Elder Village Nursing home where her mother Beth Taylor resides. (SS# 153-XX-XXXX)
- NYS Special Assessment was listed separately on the bill as listed below

Amount paid	= \$26,000
NYS Special Assessment 6.8%	= \$1,768
Total Expenses Paid	= \$27,768

Webster : TP-301 - NYS Intake Sheet



Income Tax Worksheet

(8/13)

Volunteer income tax assistance program

Name Anthony Webster		Date 03/01/2014
County Erie	School district Hamburg	Married <input checked="" type="checkbox"/> Single <input type="checkbox"/>

New York State		Yes	No
1.	Do you keep records of all your income, expenses and deductions?	X	
2.	Were you (and your spouse if filing a joint return), a New York State resident for the entire tax year? (If No, skip to question 7.)	X	
3.	Did you pay undergraduate college tuition expenses for yourself, your spouse, or your dependents? (IT-272)		X
4.	Did you pay child support through the support collection unit for at least one-half of the year? (IT-209)		X
5.	Were you (or spouse) an active volunteer fire fighter or ambulance worker for the entire tax year? (IT-245)		X
6.	Was your total household income (all individuals living with you) under \$18,000? (IT-214)		X
7.	Did you pay nursing home expenses (special assessment) during the tax year? (IT-258)	X	
8.	Did you pay long-term care insurance premiums during the tax year? (IT-249)	X	
9.	Was any of your income taxed by another state or local government (IT-112-R) or did you pay taxes to a province of Canada (IT-112-C)?		X
10.	Did you purchase taxable property or services for use in New York State without paying sales and use tax at the time of purchase? (line 59 on IT-201 – do not leave blank)		X
11.	Did you contribute to the NYS retirement system or cafeteria plan during the tax year? (shown in box 14 on your W-2 as 414H or IRC125)?		X
12.	Did you make contributions to a NYS 529 college savings plan during the tax year?		X
13.	Did you earn interest on U.S. government bonds during the tax year?		X
14.	Did you receive pension payments from New York State or a NYS local government, or a federal government pension plan?		X
15.	Are you receiving any pension payments, for work you performed, that are not from NYS, a NYS local government, or the federal government?		X
16.	Are you receiving pension payments as a beneficiary of the pension plan?		X
New York City			

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