Intake Sheet:

* Part 1 Line 3 City is Denville, NJ 07834
* Information regarding Mary’s daughter Amy should be taken from the Focused Exercises Instructions and the Focused Exercises Intake and Interview sheet. **Change Amy’s birthdate to 5/4/1997.**

W-2 Cinnamon Quilt Shoppe

* EIN = 468000752
* Box 14:
  + NJ SUI: 143.23
  + NJ DI: 64.03
  + NJFLI: 30.33
* Box 15: NJ 468000752000
* Box 16: 53,000

Other Information

* Mary did not receive a Homestead Benefit in 2018. Her income was too high in 2015.
* Upon questioning Mary regarding personal property tax, she says it is actual property tax on a small piece of land she owns in Florida
* For Sales Tax work sheet use zip code 07834 and 365 days
* Mary is not a Veteran
* Mary does not want to contribute to either the Presidential or Gubernatorial Election Campaign Funds
* Mary contributed $1000 to an FSA account and used the entire amount in 2018.
* Mary’s daughter did not receive a 2017 1098-T.
* If Mary is due a refund on her Federal and/or NJ return she would like to have the money direct deposited into her checking account
  + Routing # 021200339 - Account # 54789
* If Mary owes on her Federal and/or New Jersey return she wants the funds to be taken from her checking account.