Intake Sheet:

* Part 1 Line 3 City is Denville, NJ 07834
* Alicia Davis Died January 5, 2018.

1099-R Duvall County School District

* EIN = 843000752

1099-DIV Grant Investment Services – Exempt Interest Dividends -$319.37

|  |  |  |
| --- | --- | --- |
|   | NJ Fidelity Fund | Fidelity Muni |
| Split between funds | $175 | $144.37 |
| NJ Turnpike Bonds | 91% | 10% |
| Mass. Turnpike Bonds | 9% |  |
| Puerto Rico Infrastructure Bonds |  | 18% |
| Arizona State Bonds |  | 72%  |

Other Information

* All dates shown as 2019 should be changed to 2018.
* Ronald paid $10,000 in property taxes for the year. Block 5 lot 10 This includes his homestead benefit.
* Ronald also received $250 veteran’s property tax credit
* Ronald had no out of pocket medical expenses
* Ronald is a Veteran
* Ronald does not want to contribute to the Presidential Election Campaign Fund/
* Ronald would like his NJ Gubernatorial Election Campaign Fund contribution to be the same as his federal.
* If Ronald is due a refund on his Federal and/or NJ return he would like to receive a check
* If Ronald owes on his Federal and/or New Jersey return he will pay by check.