

SIMULATED DATA		
2021 IT40		
INDIANA INDIVIDUAL INCOME TAX		
TEST # 3		
SCHEDULE/FORM	LINE DESCRIPTIONS	CPA ANSWERS
IT-40		
	STATE RETURN ONLY?	N
	DATE FROM	1/1/2020
	DATE TO	12/31/2020
	TP SSN	400004078
	SPOUSE SSN	400004079
	FIRST NAME	MASON
	MIDDLE INITIAL	P
	LAST NAME	GOLD
	SPOUSE FIRST NAME	SIENNA
	SPOUSE MIDDLE INITIAL	J
	SPOUSE LAST NAME	GOLD
	STREET	15 HOLT WAY
	CITY	EVANSVILLE
	STATE	IN
	ZIP	47710
	COUNTY LIVED	40
	COUNTY WORKED	82
	SPOUSE COUNTY LIVED	40
	SPOUSE COUNTY WORKED	3
LINE 1	FEDERAL AGI	29700
LINE 22 A	ROUNDING NUMBER	123123123
LINE 22 B	ACCOUNT NUMBER	559002456
LINE 22 C	ACCOUNT TYPE	SAVINGS
SCHEDULE 1		
LINE 6	6A CODE	148
	6A AMOUNT	500
	6B CODE	147
	6B AMOUNT	-150
SCHEDULE 2		
LINE 2	ADDRESS IF DIFFERENT	SAME
LINE 2	NUMBER OF MONTHS LIVED THERE	12
LINE 2	AMOUNT OF PROPERTY TAX PAID	1500
LINE 8	PRIVATE SCHOOL/HOMESCHOOL DEDUCTION	1000

SCHEDULE 3		
LINE 2	NUMBER OF DEPENDENTS	2
LINE 3	NUMBER OF ADDITIONAL DEPENDENTS	2
LINE 4	PRIMARY OVER 65 OR BLIND	X
LINE 4	NUMBER OVER 65 OR BLIND	1
LINE 5	PRIMARY ADDITIONAL OVER 65	X
LINE 5	NUMBER ADDITIONAL OVER 65	1
SCHEDULE 5		
LINE 1	STATE TAX WITHHELD	850
LINE 2	COUNTY TAX WITHHELD	335
LINE 3	EST TAX PAID	700
SCHEDULE 6		
LINE 6	6A CODE	837
LINE 6	6A AMOUNT	600
SCHEDULE 7		
LINE 1	FILING FED RETURN	Y
LINE 7	DAYTIME PHONE NUMBER	8123331212
LINE 7	EMAIL ADDRESS	MPGOLD@IU.EDU
SCHEDULE CT40		
LINE 1A	TP STATE TAXABLE INCOME	19050
LINE 2A	TP TAX RATE	0.0250
SCHEDULE INDEP		
LINE 1A	DEPENDENTS FIRST NAME	JUSTIN
LINE 1B	DEPENDENTS LAST NAME	WHITE
LINE 1C	DEPENDENTS SOCIAL SECURITY NYMBER	400014080
LINE 1D	DEPENDENTS DATE OF BIRTH	1/1/2004
LINE 1E	ADDITIONAL DEPENDENT	X
LINE 2A	DEPENDENTS FIRST NAME	ANDREA
LINE 2B	DEPENDENTS LAST NAME	GOLD
LINE 2C	DEPENDENTS SOCIAL SECURITY NYMBER	400014081
LINE 2D	DEPENDENTS DATE OF BIRTH	1/1/2009
LINE 2E	ADDITIONAL DEPENDENT	X
LINE 6	DEPENDENT EXEMPTIONS	2
LINE 7	ADDITIONAL DEPENDENT EXPEMPTIONS	2

SCHEDULE 529		
LINE 1B	ACCOUNT NUMBER	61000005112
LINE 1C	HIGHER EDUCATION	1000
LINE 1D	K-12 EDUCATION	1000
LINE 2A	DO NOT OWN THE ACCOUNT	X
LINE 2B	ACCOUNT NUMBER	2000001704600001
LINE 2C	HIGHER EDUCATION	1000
SCHEDULE EIC		
LINE A1	FEDERAL EIC	4971
LINE A2	EARNED INCOME	29700
CHILD 1	FIRST NAME	JUSTIN
CHILD 1	LAST NAME	WHITE
CHILD 1	SSN	400014080
CHILD 2	FIRST NAME	ANDREA
CHILD 2	LAST NAME	GOLD
CHILD 2	SSN	400014081
LINE B1	CHILD 1	A
LINE B2	CHILD 1	A
LINE B3	CHILD 1	A
LINE B1	CHILD 2	D
LINE B2	CHILD 2	B
LINE B3	CHILD 2	A
SCHEDULE IN-40PA		
LINE 1	FIRST/LAST NAME FIRST ON THE RETURN	MASON P GOLD
LINE 1	SSN SHOWN FIRST	400004078
LINE 1	FIRST/LAST NAME SECOND ON THE RETURN	SIENNA P GOLD
LINE 1	SSN SHOWN SECOND	400004079
LINE 1	CHECK HERE IF SPOUSE REQUESTING RELIEF	X
LINE 2	STREET ADDRESS	15 HOLT WAY
LINE 2	CITY	EVANSVILLE
LINE 2	STATE	IN
LINE 2	ZIP CODE	47710
LINE 3	ADDRESS ON JOINT RETURN DIFFERENT THAN ABOVE	NO
LINE 4A	INCOME/WAGES - JOINT	29700
LINE 4B	INCOME/WAGES - ALLOCATED TO YOU	14700
LINE 4C	INCOME/WAGES - ALLOCATED TO SPOUSE	15000
LINE 6	INDIANA ADD-BACKS CODE	148
LINE 6	INDIANA ADD-BACKS CODE	147

LINE 6A	SHARE OF ADD-BACK - JOINT	350
LINE 6C	SHARE OF ADD-BACK - ALLOCATED TO SPOUSE	350
LINE 7A	SHARE OF DEDUCTION - JOINT	2500
LINE 7B	SHARE OF DEDUCTION - ALLOCATED TO YOU	1750
LINE 7C	SHARE OF DEDUCTION - ALLOCATED TO SPOUSE	750
LINE 8A	NUMBER OF EXEMPTIONS - JOINT	8500
LINE 8B	NUMBER OF EXEMPTIONS - ALLOCATED TO YOU	7500
LINE 8C	NUMBER OF EXEMPTIONS - ALLOCATED TO SPOUSE	1000
LINE 9A	WITHHOLDING CREDITS - JOINT	1185
LINE 9B	WITHHOLDING CREDITS - ALLOCATED TO YOU	335
LINE 9C	WITHHOLDING CREDITS - ALLOCATED TO SPOUSE	850
LINE 10A	CREDITS - JOINT	945
LINE 10B	CREDITS - ALLOCATED TO YOU	945
LINE 10C	CREDITS - ALLOCATED TO SPOUSE	0
LINE 11A	PAYMENTS - JOINT	700
LINE 11B	PAYMENTS - ALLOCATED TO YOU	350
LINE 11C	PAYMENTS - ALLOCATED TO SPOUSE	350