

2015 Test Case 17

Taxpayers: Test Hawk 400-00-5417 1510 Western St, Oshkosh WI 54901
Joy Hawk 400-00-5477

Dependents: William Jones 400-00-5441 **Date of birth:** 4/15/1999
Elizabeth Hawk 400-00-5442 **Date of birth:** 10/15/2002

Scenario: Taxpayers are resident wage earners under age 65 and are claiming a homestead credit greater than \$300. His wage statement should show a pre-tax contribution to a 401(k) plan (code D) and hers should show nontaxable sick pay (code J). They received interest income, a portion of which came from US savings bonds, and capital gain distributions. He received a distribution from an IRA, only part of which was taxable. She rolled over a distribution from her pension fund. He received Supplemental Security Income and she received Wisconsin Works for 3 months during the year and child support.

The taxpayers rented for part of the year then moved into a home they purchased. The rent certificate and tax bill should show the following conditions:

Rent Certificate: Property is subject to taxes. The monthly rent changed during the time they lived there in 2015. Heat was not included in the rent.

Tax bill: The property is on 5 acres of land. It is not a farm. They received a lottery credit.

Forms: Resident WI return (Form 1 or 1A), Schedule H, Homestead Notes, Rent Certificate, Property Tax Bill, federal return (Form 1040A or 1040), Schedule B (optional), Forms W-2, Forms 1099-R (optional).