

2015 PATS Test #3

Name: Test Pine

Spouse Name: Test Conifer

Social Security Number: 400-00-5403

Spouse Social Security Number: 400-00-5474

Test Pine Date of Birth: 01/10/1938

Test Conifer Date of Birth: 05/01/1939

Address: 718 West Clairemont Avenue, Suite 107, Eau Claire, WI 54701

Filing Status: Married Filing Joint

Residency Status: Full year resident

Test Pine Date of Death: 10/15/2015

Test Pine Wisconsin W-2 Wages: Greater than \$500,000.00

Test Pine Wisconsin W-2 Withholding: \$9,800.00

Test Pine Wisconsin W-2 Employer's State ID Number: 036-9812459100-02

Test Pine Short-Term Capital Gain: \$200.00

Test Conifer Wisconsin W-2 Wages: Less than \$15,000.00

Test Conifer Wisconsin W-2 Withholding: \$500.00

Test Conifer Wisconsin W-2 Employer's State ID Number: 036-9992459199-02

Test Conifer SSA 1099 income: \$11,000.00

Test Conifer Long-Term Capital Gain: \$9,300.00

Federal Adjusted Gross Income: \$600,000.00

Dependent #1: Test Needle 400-00-5466

Dependent #2: Test Cone 400-00-5464

College Savings Accounts: Test Pine made contributions for both dependents. Test Pine did not take any distributions from these accounts in 2015.

Wisconsin Income: Less than \$600,000.00

Property Taxes Paid on Home in 2015: \$5,000.00

Federal Itemized Deduction:

Total State and Local Taxes: \$15,800.00
Home Mortgage Interest: \$5,000.00
Investment Interest: \$1,400.00
Charitable Gifts: 5,200.00
Miscellaneous Deductions Subject to Limit: \$0.00
Miscellaneous Deductions not Subject to Limit: \$0.00

Sales Tax Due: \$0.00

2015 Estimated Tax Payments: \$40,000.00

Refund: Direct deposited into checking account
Bank Routing Number: 075911852
Bank Account Number: 4444444444

Test Conifer wants their Wisconsin Department of Revenue Form 1099-G to be sent electronically next year.