

SwiftFP Example Tax Returns
Exercise Number 8 (Residential Energy Credit)
Forms Included: 1040, 1099-NEC, 5695, 8995, W-2. Schedules Included: A, C, and SE

Client's First Name, Initial, and Last Name Patricia S. Sprout

Client's Social Security Number 334-00-5179

Filing Status Married Filing Separate

***** Spouse did not live with Taxpayer at any time last year.**

***** Taxpayer is not required to itemize.**

Taxpayer's Date of Birth: 06/15/1968

Occupation Teacher

Spouse's Date of Birth: 06/15/1967

Spouse's First Name, Initial, and Last Name Patrick S. Sprout

Spouse's SSN 334-00-3144

Street Address 4224 W 179th St

Zip Code 30809 (Evans, Georgia)

Daytime Telephone 706-868-0985

E-mail pssprout@yahoo.com

Neither Taxpayer nor Spouse is Blind or Deceased

No Dependents

Healthcare Information: Taxpayer did not purchase health insurance through the Health Insurance Marketplace.

W-2 Information

Employer Identification Number 36-2684803

Employer Name/Address Governors State University, 1 University Pkwy

Zip Code 30815 (Hephzibah, GA)

Wages \$67880

Federal Withholding \$7708

State GA State ID Number 36-2684803

State Tax Withheld \$3361

Schedule C Information

Business Code: 531210

Principal Business Office of Real Estate Agents and Brokers

No Address or Business Name

Income**Form 1099-NEC Information**

Employer Identification Number 36-3916733

Employer Name/Address : Warner Residential Sales, 120 Lalle St Fl 20

Zip Code 33036 (Islamorada, FL)

Nonemployee Compensation \$6240

Expenses (all Other Expenses)

Brokerage Fees \$1140

Internet Fees \$594

Licensing Fee \$153

Software \$101

Membership \$1117

Gifts \$74

Form 5695 – Residential Energy Credits

Qualified for Residential Energy Property Expenditures YES

Incurred Costs for Qualified Energy Property on Home Located in the U.S.

Qualified Energy Property was Originally Placed in Service by You

Address where the property was installed is the taxpayer's address

Residential Energy Property Costs for a Central Air Conditioner \$5856