

**Test Scenario 1** (NACTP Test 1)

*Oklahoma Form:* 511

*Taxpayer:* EEEE ZZZZZZ  
1040 EZ Way  
Oklahoma City, OK 73110

*SSN:* 400-00-5001

*W2:* Oklahoma withholding = \$75

*Direct Deposit:* Change to a valid routing number  
Tinker Federal Credit Union  
RTN 303085829  
DAN 02135763

*Additional Information:*

- Does not qualify for Form 538S. Taxpayer lives with a roommate; the total gross household income exceeds the \$20,000 income limit.
- No use tax is due.
- Taxpayer would like to donate \$5.00 to Support of Domestic Violence and Sexual Assault Services.
- Check the box to allow OTC to speak to the tax preparer.

*Final Result* - Refund equals \$70 (Form 511, line 38).

**NACTP**

**Test 1**

Single taxpayer with 1 W2

**Forms:** 1040EZ, W2 (1)

**Taxpayer:**

EEEE ZZZZZZ

1040 EZ Way

Wynot, NE 68792

SSN: 600-00-1001

DOB: 08/19/1990

**Filing Status:** Single

**Direct Deposit:**

Plains Credit Union / Checking Account

RTN 123456780

DAN 02135763

EEEE ZZZZZZ
1040 EZ WAY
WYNOT, NE 68792

Your social security number 600-00-1001
Spouse's social security number
Make sure the SSN(s) above are correct.
Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. [ ] You [ ] Spouse

Foreign country name Foreign province/state/county Foreign postal code

Income

Attach Form(s) W-2 here.

Enclose, but do not attach, any payment.

1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W- 2. Attach your Form(s) W- 2. 1 2,200.
2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ. 2
3 Unemployment compensation and Alaska Permanent Fund dividends (see instructions). 3
4 Add lines 1, 2, and 3. This is your adjusted gross income. 4 2,200.
5 If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on page 2. [ ] You [ ] Spouse
If no one can claim you (or your spouse if a joint return), enter \$10,000 if single; \$20,000 if married filing jointly. See page 2 for explanation. 5 10,150.
6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter - 0-. This is your taxable income. 6 0.

Payments, Credits, and Tax

7 Federal income tax withheld from Form(s) W- 2 and 1099. 7 400.
8a Earned income credit (EIC) (see instructions). NO 8a
b Nontaxable combat pay election. 8b
9 Add lines 7 and 8a. These are your total payments and credits. 9 400.
10 Tax. Use the amount on line 6 above to find your tax in the tax table in the instructions. Then, enter the tax from the table on this line. 10

Refund

Have it directly deposited! See instructions and fill in 11b, 11c, and 11d or Form 8888.

11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your refund. If Form 8888 is attached, check here [ ] 11a 400.
b Routing number 123456780 c Type: [X] Checking [ ] Savings
d Account number 02135763

Amount You Owe

12 If line 10 is larger than line 9, subtract line 9 from line 10. This is the amount you owe. For details on how to pay, see instructions. 12

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)? [ ] Yes. Complete below. [X] No
Designee's name Phone no. Personal ID number (PIN)

Sign Here

Joint return? See instructions. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and, to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.
Your signature Date Your occupation Daytime phone number
- For Information Only - CSR
Spouse's signature. If a joint return, both must sign. Date Spouse's occupation If the IRS sent you an ID Protection PIN, enter it here (see inst.)
----- Do Not File -----

Paid Preparer Use Only

Print/Type preparer's name Preparer's signature Date Check [ ] if self-employed PTIN
KATHLEEN PERRY 09/05/2014 P11111111
Firm's name HRB TAX GROUP INC Firm's EIN 43-1871840
Firm's address DUBLIN, OH 43017 Phone no. (614) 659-1158