

# Chapter 3

## Data File 3-4 Completing a 1040A

### Directions:

1. Visit [www.irs.gov](http://www.irs.gov) site and print a 1040A form, which is often referred to as the *short form*.
2. Use the following taxpayer information for Paulette and Raymond Cruz to complete the tax return.
  - Paulette and Raymond Cruz are married and file a joint tax return.
  - They have one five-year-old daughter named Isabella.
  - They are eligible for a \$3,000 dependent child care tax credit for day care.
  - They rent their home.
  - They do not owe any alternative minimum tax.
  - Their taxable interest is \$8.65.
3. Use the information on the W-2s to complete the wages section of the tax return.

<b>Sample W-2 Wage and Tax Statement</b>			
Employee's first name and initial	Last Name	1 Wages, tips, and other compensation	2 Federal income tax withheld
Paulette J.	Cruz	\$56,439.76	\$6,346.69

<b>Sample W-2 Wage and Tax Statement</b>			
Employee's first name and initial	Last Name	1 Wages, tips, and other compensation	2 Federal income tax withheld
Raymond E.	Cruz	\$66,111.55	\$10,042.86

4. Use the following tax table to determine their total taxes for the year and enter on line 28 of the 1040A form.

<b>SAMPLE Tax Table</b>						
<b>If taxable income is:</b>		<b>And you are:</b>				
<b>At least</b>	<b>But less than</b>	<i>Single</i>	<i>Married Filing Jointly</i>	<i>Married Filing Separately</i>	<i>Head of Household</i>	
<b>99,800</b>	<b>99,850</b>	21,671	17,331	22,083	19,809	
<b>99,850</b>	<b>99,900</b>	21,685	17,344	22,097	19,821	
<b>99,900</b>	<b>99,950</b>	21,699	17,356	22,111	19,834	
<b>99,950</b>	<b>100,000</b>	21,713	17,369	22,125	19,846	

5. Complete the 1040A form and submit it to your instructor.