

# Fiesta Practice Lab Example Tax Returns

## **Puerto Rico Exercise Two**

### **BASIC INFORMATION**

<i>Taxpayer Social Security Number</i>	144-00-3031
<i>Filing Status</i>	Married, wish to file jointly
<i>Taxpayer First Name and Last Name</i>	Henry La Plata
<i>Taxpayer Date of Birth</i>	9/2/1985
<i>Taxpayer Occupation</i>	Customer Service Rep
<i>Taxpayer U.S. Citizen</i>	Yes
<i>Spouse First Name and Last Name</i>	Augusta Turner
<i>Spouse SSN</i>	145-00-3032
<i>Spouse Date of Birth</i>	9/12/1987
<i>Spouse Occupation</i>	Housewife
<i>Spouse U.S. Citizen</i>	Yes
<i>Mailing Address</i>	4695 Bambino St
<i>Zip Code</i>	00968 (Guaynabo, PR)
<i>Daytime Telephone</i>	787-333-3333

### **Dependent Information**

Dependent Name	Orlando La Plata
Dependent Date of Birth	4/6/2016
Dependent SSN	146-00-3033
Relationship	Son
Dependent Not Disabled	

## **FEDERAL SECTION**

### **W-2 Information**

#### ***Taxpayer***

<i>Employer Identification Number</i>	74-1001234
<i>Employer Name/Address</i>	Department of the Treasury PO Box 600 70160 (New Orleans, LA)
<i>Wages</i>	\$ 45,319.00
<i>Federal Withholding</i>	\$ 2,649.00
<i>State</i>	PR
<i>State ID Number</i>	64-2008321
<i>State Tax Withheld</i>	\$ 4,200

### **Taxpayer Information:**

Henry and Augusta are bona fide residents of Puerto Rico.

### **Relevant Information:**

The Puerto Rico tax liability for 2019 is \$6,500. This year, Henry contributed \$5,042 to his retirement plan (401K); use Form 8880. If a refund or balance is due, they would like a direct deposit to or direct debit from their checking account 10203; routing number 25X25XX25 (X=0).

### **Child Tax Credit, Schedule 8812:**

They have a qualifying child.

### **Health Care**

Henry, Augusta and Orlando had minimum essential coverage from a private insurance company.

### **Check for following answers:**

AGI - \$45,319

Federal Refund - \$2,649