

Homework Assignment – New Tax Preparer Session #3

1. View the slides pertaining to the Earned Income Tax Credit and the corresponding information in pub 4012, tab I.

2. Enter the following information into TaxSlayer, Scenario 6, Pub 6744, pg. 78-86:

- Student Loan Interest
- Child Care Expenses
- Education Credit

3. Answer the following questions in Pub 6744, Advanced Scenarios:

- Pgs. 71 & 72, qu. 2-4
- Pg. 74, qu. 6-8
- Pg. 87, qu. 13-16 & 19
- Pg. 98, qu. 20, 21, 23, 25

4. Add form 5329 to Advanced Scenario 8, Richard Roosevelt (to claim exemption from the early retirement withdrawal penalty).