

Advanced Scenario 8: Roberta Wilson

Interview Notes

- Roberta Wilson is 63 years old and single.
- Her grandson, Jacob, is 9 years old and lived with her all year. Roberta paid all household expenses and Jacob qualifies as her dependent.
- Roberta and Jacob are both U.S. citizens and have valid Social Security numbers.
- Roberta claimed EIC for Jacob on her 2015 tax return, but he only lived with her for 2 months and the credit was disallowed.
- Roberta had wage income of \$35,000 in 2018.
- She is not sure if she should itemize or take the standard deduction.
- Roberta paid the following:
 - \$7,200 mortgage interest for a qualified home purchased in 2010.
 - In 2018, she took out a home equity loan for \$8,000 to pay off her credit cards. She paid interest in the amount of \$650 on this loan.
 - \$9,010 for real estate taxes.
 - \$1,762 for state income taxes withheld in 2018.
 - Unreimbursed doctor bills in the amount of \$2,200.
 - Unreimbursed prescription drugs for \$250.
 - Health club dues of \$600.
 - A statement received from her church showing donations made throughout the year totaling \$4,500.
 - Receipts for donations of furniture and clothing in good, used condition to Goodwill. The total estimated fair market value is \$500.
 - \$50 donated to a friend in need via their Go-Fund-Me account.
 - \$45 paid in 2018 on her 2017 balance due state income tax return.

Advanced Scenario 8: Test Questions

32. If Roberta itemizes, what amount is she able to deduct for state income and real estate taxes?
- a. \$9,010
 - b. \$10,000
 - c. \$10,772
 - d. \$10,817