Advanced Scenario 8: Roberta Wilson

Interview Notes

- Roberta Wilson is 83 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