

Here's David's sample 1040 data:

\_Name:\_ David

\_Address:\_ Miami, FL

\_Filing status:\_ Married filing jointly

\_Dependents:\_ None

\_Income:\_

- Pension income (1099-R): \$48,000
- Social Security benefits (1099-SSA): \$20,000
- Interest and dividend income:
- Savings account (1099-INT): \$1,200
- Dividends (1099-DIV): \$3,500
- Capital gains/losses:
- Sale of investments (Schedule D): \$10,000 (gain)
- Other income:
- Retirement account distributions (1099-R): \$15,000

\_Deductions:\_

- Standard deduction: \$25,900 (married filing jointly)
- Itemized deductions:
- Mortgage interest: \$0 (paid off mortgage)
- Property taxes: \$6,000
- Charitable donations: \$4,000
- Medical expenses:
- Out-of-pocket: \$5,000
- Medical miles driven: \$500
- Other itemized deductions:
- Investment expenses (Schedule A): \$1,500
- Tax preparation fees: \$500

\_Credits:\_

- Senior Credit: \$1,500
- Other credits:
- Retirement savings contributions credit (Form 8880): \$0 (not eligible)

Let me know if you need further changes!