

Study Guide for Advanced Test 2021

This study guide references two sources you should become familiar with: [PUB 4491 Training Guide](#) and [PUB 4012 Volunteer Resource Guide](#)

Scenario 1:

1. Use PUB 4491, page 4-7.
2. Use PUB 4491, page 28-5.
3. Use PUB 4012, page F-10.

Scenario 2:

4. Use PUB 4491, page vi.
5. Use PUB 4012, page G-10.

Scenario 3:

6. Use PUB 4012, page E-6.
7. Use PUB 4012, page E-7.
8. Use PUB 4012, page E-6, E-7, & E-8.

Scenario 4:

9. Use PUB 4012, page C-2, C-3, & C-4.
10. Use PUB 4012, page I-3 & I-5.

Scenario 5:

11. Use PUB 4012, page F-9.
12. Use PUB 4012, page D-53.

Scenario 6:

13. Use PUB 4012, page A-4.
14. Use PUB 4491, page 2-3.

Scenario 7: (Create a tax return in Practice Lab) Remember to use Interview Notes as well.

15. Look at the 1040, line 5b. Use PUB 4012, page D-37 for simplified method.
16. Use PUB 4491, page 14-1 & 14-2.
17. Look at the 1040, schedule 1, line 9 & use PUB 4012, page D-53.
18. Use PUB 4491, page 17-2.
19. Look at 1040, line 12a.
20. Use PUB 4491, page 22-2 & 22-3. Use PUB 4491, page viii.
21. Use PUB 4012, page G-4.
22. Look at 1040, line 25d.

Scenario 8: (Create a tax return in Practice Lab) Remember to use Interview Notes as well.

Note: For the purpose of answering the questions in this scenario, ignore the self-employed health insurance deduction and any scope issues it creates.

23. Look at the 1040, schedule D & PUB 4012, page D-23.
24. Use PUB 4491, page 9-8, 9-9, & 9-10.
25. Look at the 1040, line 21 & use PUB 4012, page E-11.
26. Look at the 1095-A, Part III, section C, line 33.
27. Look at the 1040, schedule 3, line 3 & use PUB 4012, page J-5.
28. Use PUB 4012, page D-40. Use PUB 4491, page ix.
29. Use PUB 4012, page K-15, K-16, & K-17.

Scenario 9: (Create a tax return in Practice Lab) Remember to use Interview Notes as well.

30. Use PUB 4012, page B-8.
31. Look at the 1040, line 11.
32. Use PUB 4012, page G-4, G-10, & G-11.
33. Look at the 1040, schedule 3, line 4.
34. Look at the interview notes.
35. Use PUB 4491, page iv (Tax Form Changes). Use PUB 4012, Tab G: Nonrefundable Credits.