

ANSWERS

SESSION 4 – ADJUSTMENTS TO INCOME

Problem 1 –

1. The correct answer is “d”, as all three types of contributions are reported on Form 8889.
2. She is eligible to contribute an additional \$1,000 based on her age, however, her total contribution that will count as an Adjustment to Income cannot exceed \$4,650 in 2022.
3. The correct answer is “c”. All of the unreimbursed expenses listed qualify other than the Zumba classes. There is a list on p. F-6 of Pub. 4012 that highlights the types of expenses that qualify as medical expenses, as well as those that do not. The Zumba classes would be expenses for your general health (like health club dues) and thus do not qualify.

Problem 2 – The answer is False. Bobbie is filing married filing separately and is not eligible to claim the deduction for student loan interest.