


Nicole's W-2 Wage and Tax Statement

		a Employee's social security number 123-45-6789		This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.	
b Employer identification number (EIN) 00000000		1 Wages, tips, other compensation 24,050.00		2 Federal income tax withheld 1,822.00	
c Employer's name, address, and ZIP code Yourtown Support Services 10 Broadway Yourtown, MO 12356		3 Social security wages 24,050.00		4 Social security tax withheld 1,491.00	
		5 Medicare wages and tips 24,050.00		6 Medicare tax withheld 348.73	
		7 Social security tips		8 Allocated tips	
d Control number		9 Advance EIC payment		10 Dependent care benefits	
e Employee's first name and initial Last name Suff. Nicole M. Shoemacher 123 Briargate Lane Yourtown, MO 12356		11 Nonqualified plans		12a See instructions for box 12	
		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b	
		14 Other		12c	
				12d	
f Employee's address and ZIP code		15 State Employer's state ID number 00000000		16 State wages, tips, etc. 24,050.00	
		17 State income tax 641.00		18 Local wages, tips, etc.	
				19 Local income tax	
				20 Locality name	

Form W-2 Wage and Tax Statement **2008** Department of the Treasury—Internal Revenue Service

Copy C—For EMPLOYEE'S RECORDS (See Notice to Employee on the back of Copy B.)

Safe, accurate, FAST! Use 

Nicole's Form 1040EZ

Form 1040EZ		Department of the Treasury—Internal Revenue Service		Income Tax Return for Single and Joint Filers With No Dependents (99) 2008		OMB No. 1545-0074		
Label (See page 9.) Use the IRS label. Otherwise, please print or type. Presidential Election Campaign (page 9)	LABEL HERE	Your first name and initial Nicole M.	Last name Shoemaker	Your social security number 123 45 6789		Spouse's social security number		
		If a joint return, spouse's first name and initial	Last name	▲ You must enter your SSN(s) above. ▲		Checking a box below will not change your tax or refund.		
		Home address (number and street). If you have a P.O. box, see page 9.		Apt. no.	<input type="checkbox"/> You <input type="checkbox"/> Spouse			
		123 Briargate Lane						
City, town or post office, state, and ZIP code. If you have a foreign address, see page 9.		Yourtown, MO 12356						
Income Attach Form(s) W-2 here. Enclose, but do not attach, any payment.		1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2.	1	24,050				
		2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.	2	50				
		3 Unemployment compensation and Alaska Permanent Fund dividends (see page 11).	3					
		4 Add lines 1, 2, and 3. This is your adjusted gross income .	4	24,100				
		5 If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on back. <input type="checkbox"/> You <input type="checkbox"/> Spouse If no one can claim you (or your spouse if a joint return), enter \$8,950 if single ; \$17,900 if married filing jointly . See back for explanation.	5	8,950				
		6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter -0-. This is your taxable income .	6	15,150				
Payments and tax		7 Federal income tax withheld from box 2 of your Form(s) W-2.	7	1,822				
		8a Earned income credit (EIC) (see page 12).	8a					
		b Nontaxable combat pay election.	8b					
		9 Recovery rebate credit (see worksheet on pages 17 and 18).	9					
		10 Add lines 7, 8a, and 9. These are your total payments .	10	1,822				
		11 Tax. Use the amount on line 6 above to find your tax in the tax table on pages 28–36 of the booklet. Then, enter the tax from the table on this line.	11	1,875				
Refund Have it directly deposited! See page 18 and fill in 12b, 12c, and 12d or Form 8888.		12a If line 10 is larger than line 11, subtract line 11 from line 10. This is your refund . If Form 8888 is attached, check here <input type="checkbox"/>	12a					
		b Routing number		c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings				
		d Account number						
Amount you owe		13 If line 11 is larger than line 10, subtract line 10 from line 11. This is the amount you owe . For details on how to pay, see page 19.	13	53				
Third party designee		Do you want to allow another person to discuss this return with the IRS (see page 20)? <input type="checkbox"/> Yes. Complete the following. <input type="checkbox"/> No						
		Designee's name	Phone no.	Personal identification number (PIN)				
Sign here Joint return? See page 6. Keep a copy for your records.		Your signature	Date	Your occupation Social worker	Daytime phone number (314) 965-0002			
		Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation				
Paid preparer's use only		Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's SSN or PTIN			
		Firm's name (or yours if self-employed), address, and ZIP code	EIN	Phone no.				

Jack's Completed Form 1040EZ

Answers to Exercise 7.3

Department of the Treasury—Internal Revenue Service

Form **1040EZ** **Income Tax Return for Single and Joint Filers With No Dependents (99) 2008** OMB No. 1545-0074

Label
(See page 9.)
Use the IRS label.
Otherwise, please print or type.
Presidential Election Campaign
(page 9)

Label
Your first name and initial
Jack C.
Last name
Allen
If a joint return, spouse's first name and initial
Last name
Home address (number and street). If you have a P.O. box, see page 9. Apt. no.
100 Maple Street
City, town or post office, state, and ZIP code. If you have a foreign address, see page 9.
Anytown, MO 12345

Your social security number
222 80 6002
Spouse's social security number
You must enter your SSN(s) above.

Check here if you, or your spouse if a joint return, want \$3 to go to this fund . . . **You** **Spouse**

Income Attach Form(s) W-2 here. Enclose, but do not attach, any payment.	1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2.	1	20,800
	2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.	2	
	3 Unemployment compensation and Alaska Permanent Fund dividends (see page 11).	3	
	4 Add lines 1, 2, and 3. This is your adjusted gross income .	4	20,800
	5 If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on back. <input type="checkbox"/> You <input type="checkbox"/> Spouse If no one can claim you (or your spouse if a joint return), enter \$8,950 if single ; \$17,900 if married filing jointly . See back for explanation.	5	8,950
	6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter -0-. This is your taxable income .	6	11,850
	7 Federal income tax withheld from box 2 of your Form(s) W-2.	7	1,822
	8a Earned income credit (EIC) (see page 12).	8a	
	b Nontaxable combat pay election. 8b		
	9 Recovery rebate credit (see worksheet on pages 17 and 18).	9	
	10 Add lines 7, 8a, and 9. These are your total payments .	10	1,822
11 Tax. Use the amount on line 6 above to find your tax in the tax table on pages 28–36 of the booklet. Then, enter the tax from the table on this line.	11	1,380	
Refund Have it directly deposited! See page 18 and fill in 12b, 12c, and 12d or Form 8888. 12a If line 10 is larger than line 11, subtract line 11 from line 10. This is your refund . If Form 8888 is attached, check here <input type="checkbox"/> b Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings d Account number <input type="text"/>	12a	442	
Amount you owe 13 If line 11 is larger than line 10, subtract line 10 from line 11. This is the amount you owe . For details on how to pay, see page 19.	13		

Do you want to allow another person to discuss this return with the IRS (see page 20)? **Yes**. Complete the following. **No**

Third party designee
Designee's name _____ Phone no. _____ Personal identification number (PIN) _____

Sign here
Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Your signature	Date	Your occupation	Daytime phone number
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	

Paid preparer's use only
Preparer's signature _____ Date _____ Check if self-employed Preparer's SSN or PTIN _____
Firm's name (or yours if self-employed), address, and ZIP code _____ EIN _____
Phone no. _____

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 37. Cat. No. 11329W Form **1040EZ** (2008)

Jill's Completed Form 1040EZ

Answers to Exercise 7.4

Department of the Treasury—Internal Revenue Service
Form 1040EZ **Income Tax Return for Single and Joint Filers With No Dependents** (99) **2008** OMB No. 1545-0074

Label (See page 9.)
Use the IRS label.
 Otherwise, please print or type.
Presidential Election Campaign (page 9)

Your first name and initial
Jill O.

Last name
Jones

Your social security number
608 : 40 : 1234

If a joint return, spouse's first name and initial
 Last name

Spouse's social security number

Home address (number and street). If you have a P.O. box, see page 9. Apt. no.
6 Sweetbriar Lane

▲ You must enter your SSN(s) above. ▲

City, town or post office, state, and ZIP code. If you have a foreign address, see page 9.
Anytown, MO 12345

Checking a box below will not change your tax or refund.

Check here if you, or your spouse if a joint return, want \$3 to go to this fund . . . **You** **Spouse**

Income Attach Form(s) W-2 here. Enclose, but do not attach, any payment.	1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2. Attach your Form(s) W-2.	1	20,800
	2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.	2	
	3 Unemployment compensation and Alaska Permanent Fund dividends (see page 11).	3	
	4 Add lines 1, 2, and 3. This is your adjusted gross income .	4	20,800
	5 If someone can claim you (or your spouse if a joint return) as a dependent, check the applicable box(es) below and enter the amount from the worksheet on back. <input type="checkbox"/> You <input type="checkbox"/> Spouse If no one can claim you (or your spouse if a joint return), enter \$8,950 if single ; \$17,900 if married filing jointly . See back for explanation.	5	8,950
	6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter -0-. This is your taxable income .	6	11,850
Payments and tax	7 Federal income tax withheld from box 2 of your Form(s) W-2.	7	1,335
	8a Earned income credit (EIC) (see page 12).	8a	
	b Nontaxable combat pay election. 8b		
	9 Recovery rebate credit (see worksheet on pages 17 and 18).	9	
10 Add lines 7, 8a, and 9. These are your total payments .	10	1,335	
11 Tax. Use the amount on line 6 above to find your tax in the tax table on pages 28–36 of the booklet. Then, enter the tax from the table on this line.	11	1,380	
Refund Have it directly deposited! See page 18 and fill in 12b, 12c, and 12d or Form 8888.	12a If line 10 is larger than line 11, subtract line 11 from line 10. This is your refund . If Form 8888 is attached, check here <input type="checkbox"/>	12a	
	b Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings d Account number <input type="text"/>		
Amount you owe	13 If line 11 is larger than line 10, subtract line 10 from line 11. This is the amount you owe . For details on how to pay, see page 19.	13	45
Third party designee	Do you want to allow another person to discuss this return with the IRS (see page 20)? <input type="checkbox"/> Yes . Complete the following. <input type="checkbox"/> No		
Sign here Joint return? See page 6. Keep a copy for your records.	Designee's name	Phone no.	Personal identification number (PIN)
	Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.		
Your signature	Date	Your occupation	Daytime phone number
	(800) 124-6868		
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	
Paid preparer's use only	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>
	Firm's name (or yours if self-employed), address, and ZIP code	EIN	Preparer's SSN or PTIN
		Phone no.	

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