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Financial Education for a Better Future





FILING YOUR TAXES

W-2 Scenario 5: Darcie and Jeff Naylor

Darcie is a Chef and teaches cooking at The Cook Shop and Jeff is a computer networking technician for Technology Tools, Inc. Darcie is responsible for filing the family's taxes jointly this year. You will need to include both W-2's when filing their taxes.



Married


I have a job
(received W-2)


Paid rent

Darcie and Jeff rent a home and have no children and a dog named Scout. Darcie's birthday is April 28, 1982 and Jeff's birthday is September 17, 1980. Darcie and Jeff are excited to use TurboTax this year for the first time since they used other tax software last year. For the purpose of this simulation Darcie's phone number is (555) 555-5555.

Below are Darcie and Jeff's W-2's for the simulation:

a Employee's social security number 068-43-1568		OMB No. 1545-0008 Safe, accurate, FAST! Use 		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 23-1457321		1 Wages, tips, other compensation \$40,126.00	2 Federal income tax withheld \$4,200.00		
c Employer's name, address, and ZIP code The Cook School 76 Price Road Chandler, AZ 85626		3 Social security wages \$40,126.00	4 Social security tax withheld \$2,487.81		
		5 Medicare wages and tips \$40,126.00	6 Medicare tax withheld \$581.83		
		7 Social security tips	8 Allocated tips		
d Control number		9	10 Dependent care benefits		
e Employee's first name and initial Last name Suff. Darcie Naylor 2010 Val Vista Gilbert, AZ 85234		11 Nonqualified plans	12a See instructions for box 12		
		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	12b		
		14 Other	12c		
			12d		
f Employee's address and ZIP code		15 State Employer's state ID number AZ 23-1457321	16 State wages, tips, etc. \$40,126.00	17 State income tax \$3,611.00	18 Local wages, tips, etc.

WE RECOMMEND

Free Edition


Simple tax returns

\$0 Fed. \$0 State. \$0 File.

File for \$0

Form **W-2** Wage and Tax Statement **2019**

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

a Employee's social security number 216-73-3467		OMB No. 1545-0008		Safe, accurate, FAST! Use				Visit the IRS website at www.irs.gov/efile		
b Employer identification number (EIN) 23-1707321				1 Wages, tips, other compensation \$66,199.00		2 Federal income tax withheld \$8,845.00				
c Employer's name, address, and ZIP code Technology Tools, Inc. 1010 Power Road Mesa, AZ 85202				3 Social security wages \$66,199.00		4 Social security tax withheld \$4,104.36				
				5 Medicare wages and tips \$66,199.00		6 Medicare tax withheld \$959.88				
				7 Social security tips		8 Allocated tips				
d Control number				9		10 Dependent care benefits				
e Employee's first name and initial Jeff D.		Last name Naylor		Suff.		11 Nonqualified plans		12a See instructions for box 12		
2010 Val Vista Gilbert, AZ 85234				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 AZ	Employer's state ID number 23-1707321	16 State wages, tips, etc. \$66,199.00	17 State income tax \$6,137.00	18 Local wages, tips, etc.	19 Local income tax	20 Locality name				

Form **W-2** Wage and Tax Statement

2019

Department of the Treasury—Internal Revenue Service

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There is no other information about Darcie and Jeff that you need to file their taxes.

However; at times you may be asked questions by TurboTax such as "Did Darcie or Jeff serve in the National Guard" or "is Darcie or Jeff legally Blind". Answer "no" to questions like these.