



TAKE CHARGE TODAY
Financial Education for a Better Future



FILING YOUR TAXES

W-2 Scenario 3: Andrea

Andrea is a 21-year-old part-time college student at Linn Community College and she works at the Target Distribution Center 25 hours per week as an office assistant. Andrea received this W-2 from her employer along with the 1098-T from her college. Andrea also made a charitable donation this year and got a document as proof. She needs to file her taxes - something she has never done before!

Andrea rents an apartment with two roommates, she has been on her own for just over one year – her parents do **not** claim her as a dependent. For tax purposes, she is single, and has one job. Andrea's birthday is February 16, 1998. Her Social Security number is on the W-2 below.

Because Andrea has education expenses and charitable donations, she will need to use TurboTax Deluxe

Andrea's W-2 for Target:

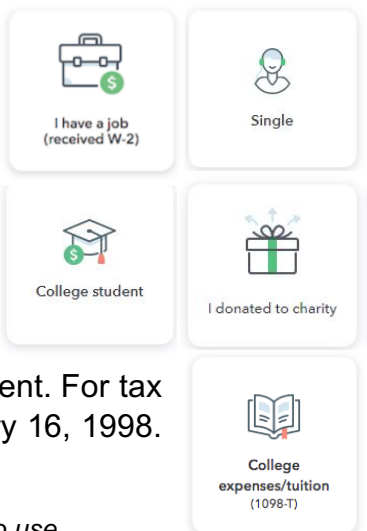
a Employee's social security number 068-43-1568		Safe, accurate, FAST! Use		irs e-file		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 41-0215170				1 Wages, tips, other compensation 18,200.00		2 Federal income tax withheld 1,030.12	
c Employer's name, address, and ZIP code TARGET Corporation 875 Beta Drive SW Albany, OR 97321				3 Social security wages 18,200.00		4 Social security tax withheld 1,128.40	
				5 Medicare wages and tips 18,200.00		6 Medicare tax withheld 263.90	
				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. Andrea C. Walker 1664 Sherman Street SE Albany, OR 97321				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	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.			
OR	0187503586	10,200.00	1,300.00				

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

2019

Department

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



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Andrea's 1098-T for Linn-Benton Community College:

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Linn-Benton Community College 6500 Pacific Blvd SW, Albany, OR 97321		1 Payments received for qualified tuition and related expenses \$ 2,400.00	OMB No. 1545-1574 2019 Form 1098-T	Tuition Statement Copy B For Student This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.
FILER'S employer identification no. 930561307	STUDENT'S TIN 068-43-1568	3		
STUDENT'S name Andrea Walker		4 Adjustments made for a prior year \$	5 Scholarships or grants \$ 0	
Street address (including apt. no.) 1664 Sherman Street SE		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January — March 2020 <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Albany, OR 97321		8 Check if at least half-time student <input checked="" type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	
Service Provider/Acct. No. (see instr.)		10 Ins. contract reimb./refund \$		

Form **1098-T** (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

Andrea's Proof of Donation to United Way:

THANK YOU FOR YOUR DONATION TO UNITED WAY	
Here are the details of your transaction for your tax records:	
Amount: \$200.00 United Way EIN: 13-1635294 Transaction ID: 3748539 Date: 05/10/2018 Payment Type: Check	
Personal Information: Andrea Walker 1664 Sherman Street SE Albany, OR 97321	 1 United Way Albany, OR 97321

Andrea's Credit Card to pay for TurboTax Deluxe:



TurboTax is free for basic federal tax filing. However; deductions for college expenses and charity are beyond basic and require an upgrade to TurboTax Deluxe.

At any point when prompted, choose Deluxe.