



Name _____ Date _____

Completing Tax Forms

Go to the internet site: <http://www.irs.gov/app/understandingTaxes/student/simulations.jsp>
Complete the two modules by clicking on the Sim 2 and Sim 7a words. When you are working through the simulations, if you need to go back to the previous page, use the back arrow. Many of the pages have buttons at the bottom to show you the W-2 form or the Tax Form.

Cicely King – Simulation 2

1. Which tax form did you use? _____
2. Your W-2 states that you earned _____ from your job.
3. The amount of tax withheld was _____.
4. Based on your tax return, the amount of your tax for the year is _____.
5. Do you get a refund or do you owe money? _____ How much? _____

Monica Lindo – Simulation 7-A

1. Which tax form did you use? _____
2. Your W-2 states that you earned _____ from your job.
3. You file your taxes as _____ and you _____ be claimed as a dependent on someone else's taxes.
4. _____ is the amount of Federal taxes that were withheld.
5. How many exemptions did you claim? _____
6. What is your standard deduction? _____
7. My total tax was? _____
8. Do you get a refund or do you owe money? _____ How much? _____

Use Monica Lindo's information and complete the Utah State Tax form.

Name, Address, and SSN

PRINCIPAL COPY	Your first name and initial	Last name	CMB No. 1545-0074
	If a joint return, spouse's first name and initial		Your social security number
	Last name		Spouse's social security number
	Home address (number and street). If you have a P.O. box, see instructions.		Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, see instructions.			Make sure the SSN(s) above and on line 6c are correct. Checking a box below will not change your tax or refund.

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. You Spouse

Filing status Check only one box.
 1 Single
 2 Married filing jointly (even if only one had income)
 3 Married filing separately. Enter spouse's SSN above and full name here. ▶
 4 Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
 5 Qualifying widow(er) with dependent child (see instructions)

Exemptions

6a Yourself. If someone can claim you as a dependent, do not check box 6a.
 b Spouse
 c **Dependents:**

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> if child under age 17 qualifying for child tax credit (see page 15)
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

d Total number of exemptions claimed. Boxes checked on 6a and 6b. No. of children on 6c who: = lived with you = did not live with you due to divorce or separation (see instructions). Dependents on 6c not entered above. Add numbers on lines above ▶

Income

7 Wages, salaries, tips, etc. Attach Form(s) W-2.	7
8a Taxable interest. Attach Schedule B if required.	8a
b Tax-exempt interest. Do not include on line 8a.	8b
9a Ordinary dividends. Attach Schedule B if required.	9a
b Qualified dividends (see instructions).	9b
10 Capital gain distributions (see instructions).	10
11a IRA distributions.	11a
11b Taxable amount (see instructions).	11b
12a Pensions and annuities.	12a
12b Taxable amount (see instructions).	12b
13 Unemployment compensation and Alaska Permanent Fund dividends.	13
14a Social security benefits.	14a
14b Taxable amount (see instructions).	14b
15 Add lines 7 through 14b (far right column). This is your total income. ▶	15

Adjusted gross income

16 Educator expenses (see instructions).	16
17 IRA deduction (see instructions).	17
18 Student loan interest deduction (see instructions).	18
19 Tuition and fees. Attach Form 8917.	19
20 Add lines 16 through 19. These are your total adjustments.	20
21 Subtract line 20 from line 15. This is your adjusted gross income. ▶	21

Tax, credits, and payments	22	Enter the amount from line 21 (adjusted gross income).	22	
	23a	Check <input type="checkbox"/> You were born before January 2, 1946, <input type="checkbox"/> Blind <input type="checkbox"/> Spouse was born before January 2, 1946, <input type="checkbox"/> Blind } Total boxes checked ▶ 23a <input type="checkbox"/>		
	b	If you are married filing separately and your spouse itemizes deductions, see page 30 and check here ▶ 23b <input type="checkbox"/>		
	24	Enter your standard deduction (see instructions).	24	
	25	Subtract line 24 from line 22. If line 24 is more than line 22, enter -0-.	25	
	26	Exemptions. Multiply \$3,650 by the number on line 6d.	26	
	27	Subtract line 26 from line 25. If line 26 is more than line 25, enter -0-. This is your taxable income. ▶ 27	27	
	28	Tax, including any alternative minimum tax (see instructions).	28	
	29	Credit for child and dependent care expenses. Attach Form 2441.	29	
	30	Credit for the elderly or the disabled. Attach Schedule R.	30	
	31	Education credits from Form 8863, line 23.	31	
	32	Retirement savings contributions credit. Attach Form 8880.	32	
	33	Child tax credit (see instructions).	33	
	34	Add lines 29 through 33. These are your total credits.	34	
	35	Subtract line 34 from line 28. If line 34 is more than line 28, enter -0-.	35	
	36	Advance earned income credit payments from Form(s) W-2, box 9.	36	
	37	Add lines 35 and 36. This is your total tax. ▶ 37	37	
	38	Federal income tax withheld from Forms W-2 and 1099.	38	
	39	2010 estimated tax payments and amount applied from 2009 return.	39	
	40	Making work pay credit. Attach Schedule M.	40	
	41a	Earned income credit (EIC).	41a	
	b	Nontaxable combat pay election.	41b	
	42	Additional child tax credit. Attach Form 8812.	42	
	43	American opportunity credit from Form 8863, line 14.	43	
	44	Add lines 38, 39, 40, 41a, 42, and 43. These are your total payments. ▶ 44	44	
	45	If line 44 is more than line 37, subtract line 37 from line 44. This is the amount you overpaid.	45	
	46a	Amount of line 45 you want refunded to you. If Form 8888 is attached, check here ▶ <input type="checkbox"/> 46a		
	b	Routing number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> ▶ c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d	Account number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
	47	Amount of line 45 you want applied to your 2011 estimated tax.	47	
Refund	48	Amount you owe. Subtract line 44 from line 37. For details on how to pay, see instructions.	48	
	49	Estimated tax penalty (see instructions).	49	
Third party designee	Do you want to allow another person to discuss this return with the IRS (see instructions)? <input type="checkbox"/> Yes. Complete the following. <input type="checkbox"/> No			
	Designee's name ▶	Phone no. ▶	Personal identification number (PIN) ▶	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Sign here	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list 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.			
Joint return? See page 13. Keep a copy for your records.	Your signature	Date	Your occupation	Daytime phone number
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	
Paid preparer use only	Print/type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed PTIN
	Firm's name ▶			Firm's EIN ▶
	Firm's address ▶			Phone no.

If you have a qualifying child, attach Schedule BC.

Direct deposit? See instructions and fill in 46b, 46c, and 46d or Form 8888.

Joint return? See page 13. Keep a copy for your records.