

Filing Your Taxes




W-2 Scenario: Karissa Rettig

Karissa is an independent adult working full-time at Banfield Pet Clinic as a veterinarian assistant. She received a W2 from her employer in January and needs to file her taxes! Last year, Karissa changed her W4 and indicated she had 6 allowances even though that is not accurate. Karissa noticed that her bi-weekly paycheck went up by over \$100 after the change. Last year she got a \$500 federal tax refund.

Karissa rents an apartment with a roommate, she has been independent several years. For tax purposes, she is single, and has one job. Karissa's birthday is August 11, 1992.

Karissa has no dependents and has no other complex expenses (deductions).

a Employee's social security number 398-49-6480		OMB No. 1545-0008		Safe, accurate, FAST! Use 		Visit the IRS website at www.irs.gov/efile	
b Employer identification number (EIN) 92-0123456		1 Wages, tips, other compensation 34,500.00		2 Federal income tax withheld 1555.00			
c Employer's name, address, and ZIP code Banfield Pet Clinic 279 Northgate Drive Suite 1231 Kansas City, MO 64106		3 Social security wages 34,500.00		4 Social security tax withheld 2139.00			
		5 Medicare wages and tips 34,500.00		6 Medicare tax withheld 500.25			
		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. Karissa Rettig 965 Spring Court Apt. #12 Kansas City, MO 64106		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			
f Employee's address and ZIP code				12d			
15 State MO	Employer's state ID number 935135121	16 State wages, tips, etc. 34,500.00	17 State income tax 1,428.00	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	

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

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

When asked about the stimulus payment, Karissa received a \$1200 payment in 2020.

If asked on the state return, Kansas City is in Jackson county.

There is no other information about Karissa that you need to file her taxes. However, at times you may be asked questions by TurboTax such as "Did Karissa serve in the National Guard" or "Did Karissa own a foreign bank account". Answer "no" to questions like these.

