

# Jackson Scenario

22222		Employee's social security number 404-00-3164		OMB No. 1545-0008	
b Employee identification number (EIN) 62-1659797		1 Wages, tips, other compensation 29,925.00		2 Federal income tax withheld 3,067.48	
c Employee's name, address, and ZIP code  Financial Fortune  379 Downtown Avenue		3 Social security wages 31,500.00		4 Social security tax withheld 1953.00	
		5 Medicare wages and tips 31,500.00		6 Medicare tax withheld 456.75	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial Last name  Phillip Jackson  698 Bridgeport Ave  Nashville, TN 37209		11 Nonqualified plans		12a D   1575.00	
		13 Statutory employee <input type="checkbox"/> Retirement plan <input checked="" type="checkbox"/> Third party pay <input type="checkbox"/>		12b DD   1848.00	
		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.	
				19 Local income tax	
				20 Locality name	

Department of the Treasury - Internal Revenue Service

**Form W-2 Wage and Tax Statement**  
Copy 1 - For State, City, or Local Tax Department

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.  Big Bank  713 Main Street		Payer's ITIN (optional)		OMB No. 1545-0112		<b>Interest Income</b>
PAYER'S federal identification number 62-1613456		RECIPIENT'S identification number 404-00-3164		Form 1099-INT		
RECIPIENT'S name  Phillip Jackson  Street address (including apt. no.) 698 Bridgeport Ave  City or town, state or province, country, and ZIP or foreign postal code Nashville, TN 37209		FATCA filing requirement <input type="checkbox"/>		1 Interest income \$ 264.37		<b>Copy B For Recipient</b>  <small>This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.</small>
				2 Early withdrawal penalty \$		
				3 Interest on U.S. Savings Bonds and Treas. obligations \$		
				4 Federal income tax withheld \$		
				5 Investment expenses \$		
				6 Foreign tax paid \$		
				7 Foreign country or U.S. possession \$		
				8 Tax-exempt interest \$		
				9 Specified private activity bond interest \$		
				10 Market discount \$		
				11 Bond premium \$		
				12 Bond premium on Treasury obligations \$		
				13 Bond premium on tax-exempt bond \$		
Account number (see instructions)		14 Tax-exempt and tax credit bond CUSIP no.		15 State		16 State identification no.
						17 State tax withheld \$

Form 1099-INT (keep for your records) [www.irs.gov/form1099int](http://www.irs.gov/form1099int) Department of the Treasury - Internal Revenue Service

DRIVER LICENSE

TENNESSEE  
THE VOLUNTEER STATE



DL 791147611 DOB 04/09/1980  
EXP 06/24/2030 ISS 06/24/2020  
SEX M HGT 5'07" EYES BLK



JACKSON  
PHILLIP

*Phillip Jackson*

698 BRIDGEPORT AVE  
NASHVILLE, TN 37209



Primary Name (as shown on SS Card) <b>Phillip Jackson</b>		Spouse Name (as shown on SS Card)			
Social Security # 404-00-3164	Date of Birth (MM/DD/YYYY) 04/09/1980	Social Security #	Date of Birth (MM/DD/YYYY)		
Can anyone claim you as a dependent? YES or <b>NO</b> Were you married as of Dec 31st? Yes or <b>NO</b>		If married, Live together? Y or N If no when did you separate?(MM/DD/YYYY)			
Occupation: financial analyst		Occupation:			
Email Address: jackson@ffortune.com		Email Address:			
Address IRS can send notices to: 698 Bridgeport Ave		City: Nashville	State: TN	Zip: 37209	
Phone: Primary 615-719-1825			Phone: Spouse		
<b>Dependents:</b>					
Name	DOB	SS#	SS Card (Y or N)	Relationship	Months in Home in 2022
<b>DEPENDENTS</b> ***Can anyone else claim your dependent(s) listed above? YES or NO. ***					
Did you, any dependents, or Anyone on your behalf Purchase HEALTH INSURANCE FROM THE MARKETPLACE? YES OR <b>NO</b> ?					
Do you or you spouse owe the IRS or have Student Loan debt? NO Who owes the debt?					
<p>Incorrect information will delay your refund. This Jackson Hewitt office will never knowingly assist you in filing a fraudulent return. If you cannot provide all your income or expenses at the this time, you should not file this return. If you file and later find you have additional information you will need to AMEND at a cost of \$100 in additional fees and could possibly owe additional tax to the IRS. Always file any additional information prior to April 15th.</p>					

DIRECT DEPOSIT AUTHORIZATION FORM

**Name of Financial Institution** \_\_\_\_\_  
**Routing #** \_\_\_\_\_  
**Account #** \_\_\_\_\_  
**Type of Account: Checking/ Prepaid Card/ Savings** \_\_\_\_\_

DRIVERS LICENSE INFORMATION

**LICENSE NUMBER** \_\_\_\_\_  
**ISSUE DATE** \_\_\_\_\_  
**EXPIRATION DATE** \_\_\_\_\_  
  
**LICENSE NUMBER** \_\_\_\_\_  
**ISSUE DATE** \_\_\_\_\_  
**EXPIRATION DATE** \_\_\_\_\_

By signing below you certify that all the information is true, correct, and complete:

*Phillip Jackson*   
 \_\_\_\_\_  
 Primary Date  
 \_\_\_\_\_  
 Spouse Date