



TAX DAY

Lesson Length: 1.25 hours + Extension Activities

Vocabulary & Expressions: Vocabulary related to filing taxes

Language/Culture Point: Phrasal verbs with “do”

Objective: Students will be able to discuss doing their taxes.


Materials: Sample paystub, sample W-2s, signal cards, computer, projector, 1040EZ, Internet connection, index cards, *internet connection*



STEP 1: ACTIVATE BACKGROUND KNOWLEDGE

Time Frame	Materials	Teaching Strategies
10 minutes	- Sample paystub - Sample W-2	- Authentic Materials

TEACHING ACTIVITY

1. Start by asking your students if they have jobs, or if they have had a job in the US. Ask them if they receive all of the money their company pays them, i.e. if they work for 10 hours at \$10/hour, do they get \$100?
2. Bring in a sample paystub and share it with your students. If your state has income tax, be sure that it is represented on the paystub. If you don't have a readily accessible example, you can find an example using Google or create your own using a website like:
 www.pay-stubs.com
3. After the students have taken a quick look at the paystub, ask questions like: “Whose paystub is this?”; “Where do they work?”; “How much money have they made this week/year?”; “How much federal income tax was taken out? Social Security? Medicare?”
4. Tell students that in the beginning of each year you have to do your taxes to make sure that you paid the right amount in the previous year.
5. Pass out a sample W-2 that shows all of the federal, state, and local taxes taken out, as applicable in your community.



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STEP 2: MINI-PRESENTATION WITH PROMPT

Time Frame	Materials	Teaching Strategies
10 minutes		- Chalk Talk

TEACHING ACTIVITY

1. Do a Chalk Talk in which you tell the story of how you file your taxes. Points to include are: when you received your W-2 and when employers have to mail them out, going to the library or going online to get a 1040EZ, filling out the form and doing your taxes, getting a refund/making a payment, and sending it in before April 15.

STEP 3: DISCUSSION AND COMPREHENSION CHECK

Time Frame	Materials	Teaching Strategies
5 minutes	- Signal Cards	- Signal Cards - True/False Quiz

TEACHING ACTIVITY

1. Make true and false statements about the process of filing taxes and the materials needed. Have students use Signal Cards to indicate True/False/I don't know.

STEP 4: HIGHLIGHT LESSON FOCUS AND MODEL TASK

Time Frame	Materials	Teaching Strategies
10 minutes	- Computer and projector - 1040EZ - Sample W-2	- Authentic Materials - Think Aloud

TEACHING ACTIVITY

1. Tell the class that today you are going to talk about filing your taxes and that you will practice filling out tax forms.
2. Project a copy of the 1040EZ tax form onto the board. Conduct a Think Aloud as you model how to fill out the form and where to find the information on the W-2. Have the class follow along with their copy of the W-2 as you search for the information and then include it on the 1040EZ.



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3. Fill out the rest of the form.

STEP 5: GUIDED PRACTICE

Time Frame	Materials	Teaching Strategies
10 minutes	<ul style="list-style-type: none">- Computer and projector- 1040EZ- Sample W-2	<ul style="list-style-type: none">- Authentic Materials

TEACHING ACTIVITY

1. Project a new blank copy of the 1040EZ form on the board. Provide the class with another W-2 sample. Ask for a student to help you fill out the form this time using the new W-2. Take turns asking each other for the targeted information.

STEP 6: PAIR OR SMALL GROUP WORK

Time Frame	Materials	Teaching Strategies
20 minutes	<ul style="list-style-type: none">- 1040EZ- Sample W-2	<ul style="list-style-type: none">- Question Asking and Answering

TEACHING ACTIVITY

1. Ask students to get into pairs. Provide each pair with a blank copy of the 1040EZ tax form and another W-2 sample. You can provide each pair with the same sample.
2. Have the students in their pairs take turns filling out the different parts of the tax form.
3. Once they have completed the tax form, ask each group to share a piece of the information they recorded on their form. For example, they could share the first/last name on the W-2, or the information that goes in lines 1-14 of the 1040EZ.



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STEP 7: HIGHLIGHT HOW ENGLISH WORKS

Time Frame	Materials	Teaching Strategies
10 minutes		- Graphic Organizers

TEACHING ACTIVITY

1. Write the phrase “do taxes” on the board. Tell your students that “do” is used to describe performing some activities.
2. Create a chart with one column on the board. Over the column write “do”..
3. Write the word “taxes” under the “do” column.
4. Ask your students if they know of any other activities that are described using “do”. Common examples include do the dishes, do laundry, do exercise, do homework.

STEP 8: QUICK CHECK AND REVIEW

Time Frame	Materials	Teaching Strategies
5 minutes	- Index Cards	- Exit Check

TEACHING ACTIVITY

1. Create a set of questions about doing taxes using index cards, being sure that there are enough to ask each student one question. The questions should refer to the information found on a W-2, the information required on a 1040EZ, or information about when a W-2 should be received, the deadline for doing your taxes, and so on.
2. Pass the cards out to your students. Tell them to look at card and be prepared to give you the answer to the question.
3. As students leave have them return the index card to you. Ask the question and have the student provide the answer.



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EXTENSION ACTIVITY: GUEST SPEAKER/USING THE TAX TABLE

Time Frame	Materials	Teaching Strategies
Varies	- 1040EZ - Sample W2s - Internet connection 	- Authentic Materials

TEACHING ACTIVITY #1

1. Ask your students if they are interested in having a tax professional visit the class to talk about taxes.

Hosting a tax professional as a guest speaker is a good opportunity for your students to learn about the taxes they or their friends/family members pay. Your students can learn more about the taxes that are taken out of their paycheck and where their money goes. It is also a good opportunity for them to ask any questions they might have.

TEACHING ACTIVITY #2

1. Find the most recent version of the IRS Tax Table. Here's a link for the 2014 Tax Table:

 <http://www.irs.gov/pub/irs-pdf/i1040tt.pdf>

2. With your students, find the taxes due for each of the W-2s used in this lesson. Have them complete the 1040EZ to determine if the person owes money or receives a refund.