



UNIT 8 • TAXES • LESSON 8.3

Your 2-Minute Prep: Filing Your Taxes

≈ 2:00

READ AT A NATURAL PACE

Read or record this the night before. It covers everything you need to walk in confident.

- 0:00** Hi, this is your two-minute prep for Lesson 8.3, **Filing Your Taxes**. It's the last lesson of the Taxes unit, and it's the payoff: today your students don't just learn about filing, they actually do it.
- 0:15** Here's the arc. You'll open by defining filing as **settling the tab**: all year, the employer withheld an estimate; filing is the once-a-year math that compares what was actually owed to what was already taken out. Too much withheld means a refund. Too little means you owe.
- 0:35** Then three quick teaching beats: **the forms**: the W-2 is the report you receive, the 1040 and 540 are the forms you file; **the deadline**: April 15, plus the difference between a deduction and a credit; and **the five steps of filing**, with the reminder that a student with one W-2 can usually file for free.
- 1:00** The heart of the class is the activity, around minute thirty. Every student gets **Jordan Reyes's W-2** from a part-time smoothie-shop job and files two teaching-version returns: a simplified federal 1040, then California's 540 2EZ. Here's the twist you shouldn't spoil: Jordan gets a **\$170 federal refund** and **owes California \$35**. Both in the same year. That contrast drives the best discussion of the unit.
- 1:25** Watch for two errors: subtracting in the wrong order on the settle-up line, and looking up *gross wages* instead of *taxable income* in the tax table.
- 1:35** You'll close with the **California Connection** (CalFile, Free File, VITA, and the CalEITC), a red-flag look at tax scams, and a Money Move: every student names where their W-2 will live in January.
- 1:50** Prep is light: print the packets, queue the slides, grab calculators. You've got this, and after today, your students will have filed their first tax return.

Prep checklist: packets printed (1 per student) • Slide Deck 8.3 queued • calculators out • answers in your pocket: federal refund \$170 • CA owes \$35.