



Gold Seal Lesson

Author(s): Marsha Kucker			Lesson Title: Filing a 1040EZ Income Tax Return			
Grade Span			ICLE Application Model			
K-4	5-8	9-12 XX	A	B	C	D XX

Instructional Focus:

Reading –

Students read a variety of grade level materials, applying strategies appropriate to various situations.

Writing –

Students write for a variety of purposes and audiences with sophistication and complexity appropriate to the grade level.

Speaking –

Students speak for a variety of purposes and audiences with sophistication and complexity appropriate to the grade level.

Listening –

Students listen for a variety of purposes appropriate to the grade level.

Number Operations and Concepts –

Students use number, number sense, and number relationships in a problem-solving situation. Students communicate the reasoning used in solving these problems.

Algebraic Concepts and Relationships –

Students use algebraic methods to investigate, model, and interpret patterns and functions involving numbers, shapes, data, and graphs in a problem-solving situation. Students evaluate and communicate the reasoning used in solving these problems.

Problem Solving and Mathematical Reasoning –

Students apply a variety of problem-solving strategies to investigate and solve problems from across the curriculum as well as from practical applications.

Performance Task

This lesson provides an overview of the procedure for completing a 1040EZ Income Tax Return. The lesson can be facilitated by the teacher or an accountant may be invited as guest speaker.

1. Have students prepare written definitions to the following terms: income tax, W-2 form, earned income credit, Internal Revenue Service, social security taxes, income taxes, unemployment compensation, gross income, dependents. Students may use the Internet and/or library resources.
2. Review with the class the definitions of these terms.
3. Distribute photocopies of a W-9 form which may be obtained from a library, post office, or a tax preparation service. Lead students through the process of completing the form.
4. Distribute photocopies of a W-2 form. Have students complete the form using fictional amounts. If a student is employed in a part-time job, that information may be used. Social security and income tax amounts should be researched and completed by the students on the W-2.
5. Explain to students that the W-2 form is used as the main source of information for completing the 1040EZ form. Students should start to understand the process of employer withholding of payroll taxes, their monthly deposits, and the submission of the W-2 form. The process of filing income tax forms compares the amount already paid in with what is actually owed.

ICLE Essential Skills

Apply in writing the rules and conventions of grammar, usage, punctuation, paragraphing and spelling. (ela1)
Follow oral or written directions. (ela4)
Identify, collect and/or select pertinent information while reading. (ela5)
Follow written directions carefully and accurately. (ela6)
Use brainstorming, role playing, and standard problem solving strategies to define a problem and suggest solutions. (ela19)
Participate, sometimes leading, in group meetings by contributing, taking turns speaking, and working toward a common goal. (ela20)
Understand the personal, social, cultural and historical significance of a text. (ela23)
Summarize, synthesize and organize information while reading. (ela24)
Know how to find and read information from a variety of electronic sources. (ela28)
Use writing as a strategy for comparing, contrasting, synthesizing ideas, concepts and generalizations from a variety of literary sources. (ela39)
Use writing as a tool for learning in formats such as learning logs, laboratory reports, note-taking, journals and portfolios. (ela40)
Apply, extend, and expand on information while reading. (ela46)
Gather information such as data, facts, ideas, concepts, and generalizations from oral sources. (ela51)
Perform operations with signed (positive and negative) numbers, including decimals, rations, percents, and fractions. (m1)
Understand basic algebraic properties (i.e., commutative: $ab = ba$; associative: $ab (c) = a (bc)$; and distributive: $a(b+c) = (ab) + (ac)$). (m3)
Understand the use of variables in expressions such as $4x$, $x+2$, $2x-1$, solve for the variable, and know how to represent expressions such as "twice the number" or "four more than the number" using variables. (m7)
Understand the correct order of operations for performing algebraic computations. (m8)
Use direct proof and indirect proof sequencing techniques to reach a conclusion. Direct proof uses the Laws of Reasoning to create an orderly arrangement of steps leading to a conclusion. Indirect proof causes an initial assumption that the conclusion is false, and through a series of logically sound reasoning steps the statement may be proved otherwise. (m32)

Scoring Guide:

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| <p>4 The student:</p> <ul style="list-style-type: none">- selects and applies appropriate mathematical procedures and makes no mathematical errors;- explores alternate solutions or uses additional approaches. <p>3 The student:</p> <ul style="list-style-type: none">- completes all parts of task;- correctly selects and applies mathematical processes with minor errors;- uses basic mathematical ideas and procedures appropriately. <p>2 The student:</p> <ul style="list-style-type: none">- incompletely selects and applies appropriate mathematical procedures;- makes some errors in mathematical processes. <p>1 The student:</p> <ul style="list-style-type: none">- Lacks understanding of process and/or uses inappropriate procedures. <p>0 The student:</p> <ul style="list-style-type: none">- makes no attempt or provides an off-topic response. |
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Keywords

English Language Arts	Mathematics	Science
Reading Comprehension Research	Algebra Algebraic operations Computation Math in daily life Problem solving	Earth Science
Writing Dictionary Vocabulary	Geometry	Life Science
Communications Discussion Listening Illustration	Statistics	Chemistry
Literature	Calculus	Physics
Other	Trigonometry	Other
	Other	