

NAME: _____

DATE: _____

ACTIVITY

Financially Me: Taxation Documentation

What + Why: Turn what you've learned into a practical checklist you can use when starting a job and handling taxes with confidence.

As people begin working, they take on new responsibilities related to earning income, paying taxes, and keeping accurate records. These responsibilities develop over time as you start a job, receive pay, and prepare to file taxes.

In this activity, you will create a Taxpayer Responsibilities Checklist—a personal reference you can use in the future that captures what to pay attention to as you begin working and earning income.

Your **Taxation Documentation** checklist will become the Financially Me component of your FinanceFolio for this topic.

Instructions:

1. Review previous activities or notes and reflect on what you've learned in this topic about worker responsibilities related to pay, taxes, and documentation.
2. Complete the Taxation Documentation Checklist by listing the specific documents, forms, records, and review the steps to consider when beginning work.
3. In the credits or deductions section, note at least one example of how responsibilities may differ for W-2 employees and 1099 (gig or freelance) workers, and include examples for each.
4. Use accurate terms and spelling, and complete all sections of the checklist to demonstrate your understanding of taxpayer responsibilities.

Taxation Documentation Checklist

Documents to Gather Before Starting a Job

(Items you need to provide to an employer)

- ☐ _____
- ☐ _____
- ☐ _____

Forms to Complete When I Start Working

(Paperwork I may be asked to fill out)

- ☐ _____
- ☐ _____
- ☐ _____

What to Verify on My Pay Stub

(Details to check for accuracy)

- ☐ _____
- ☐ _____
- ☐ _____

Records I Should Keep

(Information to save for future reference)

- ☐ _____
- ☐ _____
- ☐ _____

Documents to Gather for Tax Filing

(Forms that report income or taxes paid)

- ☐ _____
- ☐ _____
- ☐ _____

Tax Filing Deadline

(The date taxes are due each year)

- ☐ _____
- ☐ _____
- ☐ _____

Credits or Deductions Relevant to My Expected Type of Work

(Situations or expenses that may affect taxes)

- ☐ _____
- ☐ _____
- ☐ _____