

Collette and Christopher Chandler

Return Level: Basic

Interview Notes:

Collette and Christopher are married. They are not sure whether to file jointly or separately and hope you can help them with that question.

- Collette works as a preschool teacher's aide.
- Christopher is retired from the local paper mill. He receives income from a pension plan, as well as social security income.
- Collette and Christopher are raising their three grandchildren. The children have not seen their parents in the last three years, and neither parent can claim them as dependents. Collette and Christopher provide all the support for the children.
- The Chandler family donated \$750 to the local food bank.
- Collette has health insurance through her employer. Christopher receives health insurance through Medicare. The children receive insurance through Medicaid.
- They would like to receive any refunds or pay any balances due by paper check.

NOTE: To conserve paper, only pages 1-3 of the intake form were printed

Social Security Card

Collette Chandler

265-00-5388

For training purposes only

Social Security Card

Christopher Chandler

247-00-4786

For training purposes only

Social Security Card

Danisha Denson

326-00-4742

For training purposes only

Social Security Card

Danita Denson

326-00-0482

For training purposes only

Social Security Card

D'Andre Denson

302-00-6373

For training purposes only

Driver's License Number

T-6312643



Name & Address

Collette Chandler
889 Chapman Street
Ashland, VA 23005

Date of Birth

03/21/1960

Expiration Date

03/21/2026

Driver's License Number

T-5712644



Name & Address


Christopher Chandler
889 Chapman Street
Ashland, VA 23005

Date of Birth

11/16/1955

Expiration Date

11/16/2026

a. Employee's social security number 265-00-5388		Save. accurate, FAST! Use				Visit the IRS website at www.irs.gov/efile	
b. Employer identification number (EIN) 77-3724665		1. Wages, tips, other compensation \$21,246.77		2. Federal income tax withheld \$956.28			
c. Employer's name, address, and ZIP code PRESCHOOL ON THE HILL 1830 SULLIVAN ROAD ASHLAND, VA 23005		3. Social security wages \$21,246.77		4. Social security tax withheld 1,317.30			
		5. Medicare wages and tips \$21,246.77		6. Medicare tax withheld 308.08			
		7. Social security tips		8. Allocated tips			
d. Control number		9.		10. Dependant care benefits			
e. Employee's first name and initial Employee's address and ZIP code COLLETTE CHANDLER 889 CHAPMAN STREET ASHLAND, VA 23005		11. Nonqualified plans		12a. See instructions for box 12 DD \$6,185.00			
		13. Statutory Employee <input type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b.			
		14. Other		12c.			
				12d.			
15. State VA	Employer's state ID number 31-773724665	16. State wages, tips, etc. \$21,246.77	17. State income tax 976.50	18. Local wages, tips, etc.	19. Local income tax	20. Locality name	
<p>Form W-2 Wage and Tax Statement 2024</p> <p>Copy B - To Be Filed With Employee's FEDERAL Tax Return.</p> <p>This information is being furnished to the Internal Revenue Service.</p>							

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province country, ZIP or foreign postal code and phone no.

INDUSTRIAL PAPER PRODUCTS
P.O. BOX 14039
INDIANAPOLIS, IN 46163

1 Gross distribution
\$19,586.00

2a Taxable amount
\$18,961.00

2b Taxable amount not determined.

OMB No. 1545-0119

2024

Form **1099-R**

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Copy B

Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.

This information is being furnished to the IRS

PAYER'S TIN
36-3878742

RECIPIENT'S TIN
247-00-4786

3 Capital gain (included in box 2a).

4 Federal income tax withheld
\$1,514.24

RECIPIENT'S name
Street address (including apt.no.)
City or town, state or province, country, ZIP or foreign postal code

CHRISTOPHER CHANDLER
889 CHAPMAN STREET
ASHLAND, VA 23005

5 Employee contributions/ Designated Roth contributions or insurance premiums
\$625.00

6 Net unrealized appreciation in employer's securities

7 Distribution Code(s)
7

IRA/SEP/SIMPLE

8 Other
%

9a Your percentage of total distribution
%

9b Total Employee Contributions
\$13,533.00

10 Amount allocable to IRR within 5 years

11 1st year of desig. Roth contrib.

12 FATCA filing requirement

14 State tax withheld

15 State/Payer's state no.

16 State distribution

Account number (see instructions)

13 Date of payment

17 Local tax withheld

18 Name of locality

19 Local distribution

Form **1099-R**

(keep for your records)

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

FORM SSA-1099 - SOCIAL SECURITY BENEFIT STATEMENT

2024

○ PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
○ SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name

CHRISTOPHER CHANDLER

Box 2. Beneficiary's Social Security Number

247-00-4786

Box 3. Benefits Paid in 2024

\$24,368.40

Box 4. Benefits Repaid to SSA in 2024

Box 5. Net Benefits Paid for 2024 (Box 3 minus Box 4)

\$24,368.40

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit \$22,390.40

Medicare Part B premiums deducted
from your benefits \$1,978.00

Medicare Prescription Drug
premiums (Part D) deducted from
your benefits

Total Additions \$1,978.00

Benefits for 2024 \$24,368.40

Benefits for 2023

Benefits for 2022

Benefits for 2021

DESCRIPTION OF AMOUNT IN BOX 4

Box 6. Voluntary Federal Income Tax Withheld

Box 7. Address

CHRISTOPHER CHANDLER
889 CHAPMAN STREET
ASHLAND, VA 23005

Box 8. Claim Number (use this number if you need to contact SSA)

247-00-4786A