

# Marvin Mason

# Return Level: Advanced

## Interview Notes:

- Marvin is 39 and was widowed in September 2023. He has a son, Benjamin, age 5, who lived with him the entire year. Both are U.S. citizens and lived in the United States all year in 2024.
- Marvin provided the entire cost of maintaining the household and more than 50% of the support for Ben.
- Marvin purchased health insurance for himself and his son through the Marketplace starting 2/1/2024. He received a Form 1095-A.

Marvin also pays for childcare expenses for Ben to attend Sunnyside Day Care Center.

Marvin is also legally blind.

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

*Social Security Card*

**Marvin Mason**

**352-00-4456**

For training purposes only

<b>Driver's License Number</b> T-43415273	
<b>Name &amp; Address</b> Marvin Mason 4500 Swift Creek Lane Chester, VA 23831	
<b>Date of Birth</b> 04/18/1985	<b>Expiration Date</b> 04/18/2027

*Social Security Card*

**Benjamin Mason**

**144-00-3287**

For training purposes only

a. Employee's social security number  
352-00-4456

OMB No. 1545-0008

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FAST! Use



Visit the IRS website at  
www.irs.gov/efile

b. Employer identification number (EIN) 35-6002875		1. Wages, tips, other compensation \$41,000.00		2. Federal income tax withheld \$1,500.00		
c. Employer's name, address, and ZIP code  RIVER CITY CHURCH 347 LEE STREET COLONIAL HEIGHTS, VA 23834		3. Social security wages \$42,500.00		4. Social security tax withheld \$2,635.00		
		5. Medicare wages and tips \$42,500.00		6. Medicare tax withheld \$616.25		
		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  MARVIN MASON 4500 SWIFT CREEK LANE CHESTER, VA 23831		11. Nonqualified plans		12a. See instructions for box 12 D   \$1,500.00		
		13. Statutory Employee <input type="checkbox"/> Retirement Plan <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b.		
		14. Other		12c.		
		----- ----- -----		12d.		
15. State VA	Employer's state ID number 31356002875	16. State wages, tips, etc. \$41,000.00	17. State income tax 689.00	18. Local wages, tips, etc.	19. Local income tax	20. Locality name

Form **W-2** Wage and Tax Statement

**2024**

Copy B - To Be Filed With Employee's FEDERAL Tax Return.  
This information is being furnished to the Internal Revenue Service.

CORRECTED (if checked)

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

FIRST BANK  
123 WAFFLE STREET  
GOOCHLAND, VA 23063

1 Total Ordinary Dividends

\$2,800.00

OMB No. 1545-0110

Form **1099-DIV**

(Rev. January, 2022)

1b Qualified Dividends

\$2,800.00

For calendar Year

**2024**

**Dividends and Distributions**

**Copy B  
For Recipient**

PAYER'S TIN

38-473289X

RECIPIENT'S TIN

352-00-4456

2c Section 1202 gain

2d Collectables (28%) gain

2e Section 897 ordinary dividends

2f Section 897 capital gain

RECIPIENT'S name

Street address (including apt.no.)

City or town, state or province, country, ZIP or foreign postal code

MARVIN MASON  
4500 SWIFT CREEK LANE  
CHESTER, VA 23831

3 Nondividend distributions

**4 Federal income tax withheld**

5 Section 199A dividends

6 Investment expenses

7 Foreign Tax Paid

8 Foreign Country or US possession

9 Cash liquidation distributions

10 Noncash liquidation distribution

11 FATCA filing requirement

12 Exempt-Interest dividends

13 Specified private activity bond interest dividends

Account number (see instructions)

15 State

14 State Identification no.

15 State tax withheld

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form <b>1095-A</b> Department of the Treasury Internal Revenue Service	<b>Health Insurance Marketplace Statement</b> > Do not attach to your tax return. Keep for your records. <input type="checkbox"/> VOID > Go to <a href="http://www.irs.gov/Form1095A">www.irs.gov/Form1095A</a> for instructions and the latest information. <input type="checkbox"/> CORRECTED	OMB No. 1545-2232 <div style="font-size: 2em; font-weight: bold; text-align: center;">2024</div>
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<b>Part I Recipient Information</b>				
1 Marketplace Identifier 12-3456789	2 Marketplace-assigned policy number 987654	3 Policy issuer's name MARVIN MASON		
4 Recipient's name MARVIN MASON		5 Recipient's SSN 352-00-4456	6 Recipient's date of birth 04/18/1985	
7 Recipient's spouse's name		8 Recipient's spouse's SSN	9 Recipient's spouse's date of birth	
10 Policy start date 02/01/2024	11 Policy termination date 12/31/2024	12 Street address (including apartment number) 4500 SWIFT CREEK LANE		
13 City or town, State or province, Country and ZIP or foreign postal code CHESTER, VA 23831				

<b>Part II Covered Individuals</b>				
A Covered individual name	B Covered individual SSN	C. Date of birth	D. Coverage start date	E. Coverage termination date
16 MARVIN MASON	352-00-4456	04/18/1985	01/01/2024	12/31/2024
17 BENJAMIN MASON	144-00-3287	03/23/2019	01/01/2024	12/31/2024
18				
19				
20				

<b>Part III Coverage Information</b>			
Month	A Monthly Enrollment Premiums	B Monthly second lowest cost silver plan (SLCSP) premium	C. Monthly advance payment of premium tax credit
21 January			
22 February	\$446.00	\$602.00	\$388.00
23 March	\$446.00	\$602.00	\$388.00
24 April	\$446.00	\$602.00	\$388.00
25 May	\$446.00	\$602.00	\$388.00
26 June	\$446.00	\$602.00	\$388.00
27 July	\$446.00	\$602.00	\$388.00
28 August	\$446.00	\$602.00	\$388.00
29 September	\$446.00	\$602.00	\$388.00
30 October	\$446.00	\$602.00	\$388.00
31 November	\$446.00	\$602.00	\$388.00
32 December	\$446.00	\$602.00	\$388.00
<b>33 Annual Totals</b>	<b>\$4,906.00</b>	<b>\$6,622.00</b>	<b>\$4,268.00</b>

Form: 1095-A



## **Sunny Side Day Care**

456 Camelot Road

Colonial Heights, VA 23834

Ph. (804) 555-1234

December 31, 2024

Received from Marvin Mason

\$5,625 for daycare services for Benjamin Mason.

Total amount received for after school and summer care in 2024: \$5,625

EIN: 56-3001489