

Andrew Anderson

Return Level: Basic


Interview Notes:

- Andrew lives with his mother. He was not a student at all in 2025.
- Andrew lives with his mother, Beth, and she pays all the house bills.
- Andrew works part time at a hotel as a front desk clerk.

Andrew also reports having an Identity Protection PIN: 446320


Andrew would like to receive any refund via direct deposit and provided his bank account information via a check from his checking account.

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

Driver's License (Tax Training Only)	
License No. 20251209103310	
Name and Address	
ANDREW ANDERSON	
156 WISTAR WAY	
ASHLAND, VA 23005	
	
Birth Date	12/02/2006
Issue Date	11/20/2025
Expiration Date	12/02/2030

Social Security
650-00-9876
THIS NUMBER HAS BEEN ESTABLISHED FOR
ANDREW ANDERSON
For Tax Training Purposes Only

ANDREW ANDERSON		1234
156 WISTAR WAY		
ASHLAND, VA 23005		
PAY TO THE ORDER OF		\$
		DOLLARS
Your Bank Address City, State ZIP		
For		
325 07 0760	987123654	1234

		a. Employee's social security number 650-00-9876		Save. accurate, FAST! Use				Visit the IRS website at www.irs.gov/efile	
				OMB No. 1545-0008					
b. Employer identification number (EIN) 76-4004683				1. Wages, tips, other compensation \$11,270.24		2. Federal income tax withheld \$173.10			
c. Employer's name, address, and ZIP code SMH HOTEL GROUP 8000 HOLLADAY DRIVE PITTSBURGH, PA 15222				3. Social security wages \$11,270.24		4. Social security tax withheld 698.75			
				5. Medicare wages and tips \$11,270.24		6. Medicare tax withheld 163.42			
				7. Social security tips		8. Allocated tips			
d. Control number				9.		10. Dependant care benefits			
e. Employee's first name and initial Last name Suff. Employee's address and ZIP code Andrew Anderson 156 Wistar Way Ashland, VA 23005				11. Nonqualified plans		12a. See instructions for box 12 			
				13. Statutory Retirement Third-party Employee Plan sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b. 			
				14. Other		12c. 			
				-----		12d. 			
				-----		-----			
15. State VA	Employer's state ID number 54764004683	16. State wages, tips, etc. \$11,270.24	17. State income tax 556.75	18. Local wages, tips, etc.	19. Local income tax	20. Locality name			

<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Form W-2 Wage and Tax Statement Copy B - To Be Filed With Employee's FEDERAL Tax Return. This information is being furnished to the Internal Revenue Service. </div> <div style="font-size: 2em; font-weight: bold;">2025</div> </div>									

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. YOUR BANK 523 MONEY STREET RICHMOND, VA 23226		Payer's RTN (optional)		OMB No. 1545-0112 Form 1099-INT (Rev. January, 2022)		Interest Income
		1 Interest income \$148.00		For calendar Year 20 25		
		2 Early withdrawal penalty 25.00				
PAYER'S TIN 55-1234567		RECIPIENT'S TIN 650-00-9876		3 Interest on US Savings Bonds and Treas. obligations		Copy B For Recipient This is important tax information and is being furnished to the IRS. 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
RECIPIENT'S name Street address (including apt.no.) City or town, state or province, country, ZIP or foreign postal code ANDREW ANDERSON 156 WISTAR WAY ASHLAND, VA 23005		4 Federal income tax withheld		5 Investment expenses		
		6 Foreign Tax Paid		7 Foreign Country or US possession		
		8 Tax exempt interest		9 Specified private activity bond interest		
		10 Market Discount		11 Bond Premium		
		12 Bond premium on Treasury obligations		13 Bond Premium on tax-exempt bond		
Account number (see instructions)		14 Tax-exempt and tax credit bond CUSIP no.		15 State	16 State Identification no.	17 State tax withheld
Form 1099-INT (Rev. 1-2022) (keep for your www.irs.gov/Form1099INT) Department of the Treasury - Internal Revenue Service						