

COMPARE: Tax Forms and Their Purpose

Tax forms can feel like a jumble of letters and numbers. Learn how to keep them straight.

1. **Match** each tax form with its description.

List of Tax Forms				
1040	W-2	W-4	1099	I-9

FORM	PURPOSE
I am a... _____	• I arrive in the mail or electronically in January • There is one of me for every job you work as an employee • I tell you how much you earned and how much you already paid in taxes
I am a... _____	• I arrive in the mail or electronically in January • You get me if... ◦ You are NOT an employee, but were paid by a company ◦ You sold investments (for a loss or gain) ◦ You received dividend or interest payments ◦ You earned other types of income • You probably didn't withhold taxes from my earnings, so you may have a big tax bill coming up!
I am a... _____	• My filing deadline is in April • Most people who earned income last year should complete me • Beware, there is a LOT to fill out
I am a... _____	• Your employer asks you to complete me when you start a new job • You list information about yourself and your family on me • I determine how much money gets taken out of each paycheck
I am a... _____	• Your employer asks you to complete me when you start a new job • You use me to prove that you are eligible to work in the U.S. • You must provide identification when submitting me