The Tax Season Escape Room

Name _____ Date _____

Jamie worked two summer jobs and got two W-2 forms. Is Jamie owed money back? Crack all five locks to escape! (Practice forms and numbers.)

Form W-2 (practice) Employer: Burger Barn

Box 1 · Wages	Box 2 · Federal tax withheld
$6,000	$180

Form W-2 (practice) Employer: City Pool

Box 1 · Wages	Box 2 · Federal tax withheld
$4,500	$120

Escape rules (simplified): Taxable income = total wages − the standard deduction (use **$14,000**, a practice number). If that's below $0, taxable income is $0, and so is the tax owed. Refund = tax withheld − tax owed.

LOCK 1
Total wages from both W-2s (Box 1).
$

LOCK 2
Total federal tax already withheld (Box 2).
$

LOCK 3
Taxable income: total wages − $14,000. (Below $0? Write 0.)
$

LOCK 4
Tax owed on that taxable income.
$

LOCK 5
THE BIG ONE. Jamie's refund: tax withheld − tax owed. What does Jamie get back by filing?
$

1. If Jamie never files a tax return, what happens to that money?

_____

MY MONEY CHOICE

What would you do with a $300 refund? Why?

_____

_____

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The quick lesson (read aloud, about 1 minute)

> When you work, your employer **withholds** some pay for federal income tax and sends it to the IRS. Each year you file a **tax return** to check the math. If your income is low, you may owe little or nothing, and you can get the withheld money back as a **refund**. No filing, no refund.

Two teaching points

1. Your W-2 shows wages (Box 1) and tax withheld (Box 2).
2. Refund = tax withheld − tax owed.

Answer key

Lock 1 **$10,500** · Lock 2 **$300** · Lock 3 **$0** ($10,500 − $14,000 is below zero) · Lock 4 **$0** · Lock 5 **$300** refund.

1. Jamie doesn't get the $300 back. A refund only comes by filing. (The IRS generally allows about three years to claim a refund.) The real standard deduction changes each year; check IRS.gov.

10-minute run

1. Read the two W-2s together.
2. Crack locks 1–5 in pairs (6 min).
3. Discuss question 1.

Ask

"Why might a teen with a summer job want to file even if they don't owe tax?"

Goal

Employers withhold tax from paychecks. Filing a return checks the math, and if too much was withheld, you get it back.

Take it further

Show students IRS Free File (irs.gov/freefile) and talk about what documents they'd need.

Standard: National Standards for Personal Financial Education (Council for Economic Education and Jump$tart), area: **Earning Income**. Print double-sided: the activity on the front, this teaching side on the back.

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