

WORKSHOP NINE: HOW TO FILE TAXES & RESOURCES FOR DOING SO

Advanced Preparations for Workshop 9:

Set-up: Prepare room for class with adequate chair/table arrangement and sign-in sheets. Set up projector and PowerPoint slides. If facilitating an online session, set up the slides and Zoom meeting room.

Materials Needed For This Class:

1. Attendance sheet
2. Whiteboard (or virtual whiteboard)
3. Facilitator Guide
4. Student Guide: Workshop 9
5. Laptop & Projector
6. PowerPoint slides: Workshop 9
7. Paper and pens or pencils
8. “Tips to Take the Stress Out of Tax Season” Handout
9. “IRS Free File” Handout
10. “6 Steps for First Time Tax Filers” Handout
11. “The Three Basic Tax Types” Handout
12. “Credits and Deductions” Handout
13. “Common Tax Write-Offs” Handout
14. “8 Things to Know about Oregon’s Tax System” Handout
15. Common Tax Forms

Learning Objectives:

Upon conclusion of Workshop 9, participants will:

- Have a basic understanding of why we file taxes and the differences between state and federal taxes
- Have a basic understanding of common tax forms and common tax terms
- Understand the process of filing federal income tax returns and the information required to do so
- Know new resources to help them file taxes
- Know the different options for paying federal income taxes
- Know how to get a tax extension and know the dangers of back taxes.