

# Intuit TurboTax Simulation and Nearpod

Wednesday, January 26th, 2022  
7- 8 p.m. EST

Presented by: Ruben A Rivera, Director of Professional Development  
Teymour Ashkan, Strategic Partner Manager, Corporate Responsibility At Intuit

# Poll



**How confident are you in using nearpod?**

- I am new and I have never used it before.
- I have used it before and I would like to learn more.
- I am a nearpod champ!



## **Ruben Rivera, PhD**

Director of Professional Development  
Council for Economic Education



## **Teymour Ashkan**

Strategic Partner Manager  
Intuit

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# Agenda Slide

1. Review of TurboTax
2. Nearpod and TurboTax
3. Simulations and TurboTax
4. Final Assessment
5. Q & A



## Objectives

Teachers will be able to:

- Explore the new TurboTax tax simulations within Everfi: Financial Literacy.
- Learn how to use Nearpod and learn to “App Smash”.
- Learn how to incorporate different activities using Nearpod to increase student engagement.
- Learn how to assess student learning through quizzes.

**Bonus:** You can win a nearpod Premium Plus account during today's session!

# Powering Prosperity Around the World

**\$7.7B**

FY20  
Revenue

**650+**

Active  
QBO Apps

**46M**

TurboTax  
Global Customers

**5.1M**

QuickBooks Global  
Customers

**37M**

MINT + Turbo  
Users

**600k+**

Tax Pros and  
Experts

**95M+**

Credit Karma  
Customers



# Guiding Principles

## ALIGNED TO IMPACT AT SCALE

Intuit's efforts reflect our mission to Power Prosperity around the World and deliver on our belief that everyone deserves the opportunity to prosper. We are aligned to key principles to deliver Intuit's unique and ownable impact at scale:

- Supports our mission
- Aligns to our values
- Supports our True North Goals, Big Bets, and Bold Goals

SUSTAINABLE  
DEVELOPMENT  
GOALS

Using these principles our programs are also aligned with the UN SDGs that focus on education, equity for all, and protecting our planet

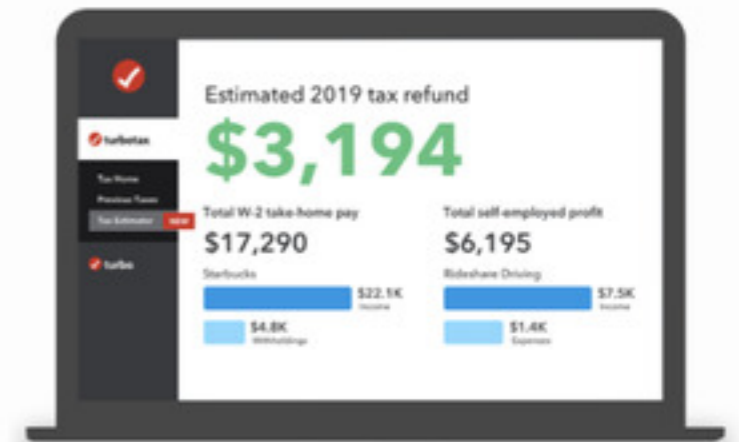




# What is TurboTax?

Practice filing fictional taxes, in **easy** and **relevant** ways

- **Demystify** Tax Day Anxiety
- Uses **IRS Free File Program** through Freedom File Alliance
- **Fictional** W2 Scenarios
- **Federal** and **State** Returns





I teach **Collaborate Board** (Subject) In (State) Grades (K-12)

I teach (Subject) In (State) Grades (K-12)

## Poll Activity

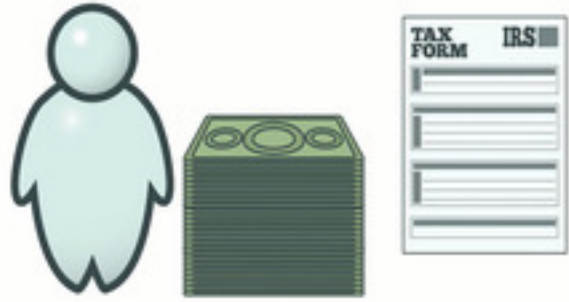
True or False

What are your thoughts about the following income tax statements?



# Poll

# GROSS INCOME



Income Taxes : True or False Gross income is also called "take-home pay"

- True
- False

# Poll





**Income Taxes : True or False Only the federal government has the power to tax personal income**

- True
- False

# Poll

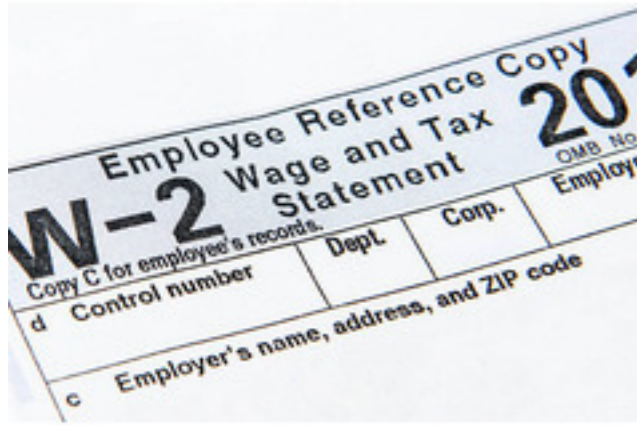


**Income Taxes : True or False Tax rates and allowable deductions and exemptions are fixed and do not change with new tax laws.**

- True
- False



# Poll



True or False A W-2 tax form shows important information about the income you've earned from your employer, amount of taxes withheld from your paycheck, benefits provided and other information for the year. You use this form to file your federal and state taxes.

- True
- False

## TurboTax Curriculum -

<https://econedlink.org/resources/intro-to-turbotax-simulation/>

What's included?

- TurboTax Simulation One-pager
- Discussion guide
- Glossary
- Teacher outline
- Curriculum Guide

## TurboTax Simulations

You can access these resources in any of the following places:

- EconEdLink.org
- Everfi.com
- Intuit.everfi.com

 **econedlink**

Sign up for a free Econedlink account:

- Access all professional development resources automatically
- Save your favorite resources to a personalized dashboard
- Save 20% or more on your purchases store forever!



Webinars and  
for PD hours  
to a

Financial Education

**I'M ALREADY A MEMBER**

<https://econedlink.org/resources/intuit-turbotax-simulation-for-high-school-students/>

- Explore the new TurboTax Curriculum
- Download updated resources to enhance tax lessons in the classroom
- Navigate the Everfi: Financial Literacy Modules

optimonster

 Help



# Free for Teachers and Students

Free for K-12 Schools, Districts and Educators

K-12 Free Digital Lessons

## EVERFI - High School Financial Literacy Lessons

Comprehensive Financial Literacy for High School Students | Easily Consumable 20-35 min. lessons

<https://everfi.com/courses/k-12/financial-literacy-high-school/>

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## TurboTax Simulations

Now that you know how to access the TurboTax resources, let's dive into the simulations.

Goals:

- Use Everfi and TurboTax with Nearpod.
- Learn how to app Smash.
- Use different tools to engage students.

# Tax Simulations

Everyone has to deal with taxes at some point in their lives. The rules are the same. Learn about how to prepare and file your taxes using the following tax simulations to remove the fear.



<https://turbotax.everfi.com/tax-simulation/>



just taken out of your paycheck!





What did you find interesting about the gig economy?  
**Collaborate Board**

**What did you find interesting about the gig economy?**



# Tax Simulations

Everyone has to deal with taxes at some point in their lives. The rules and rates are the same. Learn about how to prepare and file your taxes using the following tax simulations to remove the fear.



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< just taken out of your paycheck! >





How would you **Collaborate Board** your classroom?

**How would you apply these activities in your classroom?**

A large, stylized graphic for "Time to Climb". The word "Time" is in large, orange, 3D-style letters with a flag on top of the 'i'. Below it, "TO" is in smaller, white, 3D-style letters. The word "Climb" is in large, yellow, 3D-style letters. In the center, overlapping the 'i' in "Time" and the 'C' in "Climb", is a blue circular icon containing a white mountain peak with a blue flag on top. The background is a light blue sky with white clouds and a white mountain range.

**Time to Climb**

**Time To Climb**

# TurboTax & Everfi Simulation Demo

**Thank You!**

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