

U.S. Individual Income Tax Return

Form 1040
Tax Year 2023

*** DEMO/SAMPLE DATA ONLY ***

Personal Information

Name: Marcus Johnson **SSN:** XXX-XX-8145
Address: 4521 Riverside Parkway, Apt 202, Houston, TX 77004
Filing Status: ☒ Single

Income

1a. Wages, salaries, tips (W-2 - Healthcare Services Inc.)	\$61,500.00
1b. Wages from prior employer (Jan-May 2023)	\$0.00
2. Tax-exempt interest	\$0.00
3. Taxable interest	\$125.00
4. Dividends	\$0.00
5. Business income (Schedule C)	\$0.00
6. Other income (gig work - occasional)	\$380.00
TOTAL INCOME	\$62,005.00

Adjustments to Income

Student loan interest deduction	\$0.00
IRA deduction	\$0.00
ADJUSTED GROSS INCOME (AGI)	\$62,005.00

Deductions

Standard Deduction (Single)	\$13,850.00
TAXABLE INCOME	\$48,155.00

Tax Computation

Federal income tax	\$5,586.00
Federal tax withheld (W-2)	\$7,380.00
REFUND DUE	\$1,794.00

W-2 Information - Healthcare Services Inc.

Employer: Healthcare Services Inc.
EIN: 45-6789012

Employment Period: Full Year 2023	
Box 1 - Wages, tips, compensation	\$61,500.00
Box 2 - Federal income tax withheld	\$7,380.00
Box 3 - Social security wages	\$61,500.00
Box 5 - Medicare wages	\$61,500.00

Employment History Notes

Current Employer: Healthcare Services Inc. (June 2022 - Present)

Position: Medical Equipment Technician

Previous Employer: Memorial Hospital (2017 - May 2022)

Total Healthcare Experience: 7+ years in medical technology field

Income Stability: Consistent employment in healthcare sector with comparable compensation across positions

Key Financial Indicators:

â€¢ Stable W-2 income: \$62,000/year (~\$5,167/month base)

â€¢ Current employer: Healthcare Services Inc. (2.5 years)

â€¢ Industry experience: 7 years in healthcare

â€¢ AGI: \$62,005 (includes \$125 interest, \$380 other income)

â€¢ Filing status: Single

â€¢ Refund: \$1,794 (over-withholding, conservative taxpayer)