

# 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

<b>TOTAL INCOME</b>	<b>\$62,005.00</b>
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## Adjustments to Income

Student loan interest deduction	\$0.00
IRA deduction	\$0.00

<b>ADJUSTED GROSS INCOME (AGI)</b>	<b>\$62,005.00</b>
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## Deductions

Standard Deduction (Single)	\$13,850.00
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<b>TAXABLE INCOME</b>	<b>\$48,155.00</b>
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## Tax Computation

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

<b>REFUND DUE</b>	<b>\$1,794.00</b>
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## 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)

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\*\*\* THIS IS DEMO/SAMPLE DATA FOR SOFTWARE TESTING PURPOSES ONLY \*\*\*

Not a real tax return. For demonstration use only. Do not submit to IRS.