

2021 TAX REPORT



Prepared for:

Valued Client

KEY FIGURES

Total Income:	\$162,087
Adjusted Gross Income (AGI):	\$140,602
Deductions:	\$62,954
Taxable Income:	\$99,133
Total Tax:	\$24,856
Marginal Rate:	15.00%
Average Rate:	15.33%
2020 Safe Harbor:	\$27,342
Tax Exempt Interest:	\$0
Qualified/Ordinary Dividends:	\$6,643/\$12,240
ST/LT Capital Gains:	\$3/\$3,858
ST/LT Carryforward Loss:	\$0/\$0
Credits Claimed:	\$0

Your Marginal Tax Brackets are as follows:

The rates for your capital gains and qualified dividend income are:

MARGINAL RATE	ORDINARY INCOME THRESHOLD	COLUMN HEADING
10.00%	\$140,602	\$140,602
10.00%	\$62,954	\$140,602
10.00%	\$99,133	\$140,602
10.00%	\$24,856	\$140,602
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What shall we call these KEY FIGURES?:

ELIGIBILITY

Additional Medicare Tax	\$140,602	Under
Taxpayer IRA Contribution	\$62,954	Over
Taxpayer Roth IRA Contribution	\$99,133	Over
Taxpayer Saver's Credit	\$24,856	Over
Coverdell ESA	15.00%	Over
American Opportunity Credit	15.00%	Over
Student Loan Interest	15.00%	Over
Lifetime Learning Credit	15.00%	Over

COMMENTS:

- Taxpayer date of birth is not answered and invalidates many calculations. Please make sure all questions on the survey are answered
- Taxpayer indicated received military combat pay. If any is untaxable the IRA and Roth IRA income threshold calculations are missing this income.
- Capital gains not indicated on survey, but appear on tax return
- Estimated Payments not indicated on survey, but appear on tax return. Possibly missing or carryover from previous return
- Other income not indicated on survey, but appear on tax return.
- Social Security income not indicated on survey, but appears on tax return.
- Unemployment compensation indicated on survey, but not on tax return.
- Schedule 2 part 1 check failed. Please review Schedule 2 part 1 items to see if they add to total for this section.

- Schedule 2 part 2 check failed. Please review Schedule 2 part 2 items to see if they add to total for this section.
- Schedule D Line 1B Check Failed. Please review Schedule D Line 1b math
- Schedule D Line 8b Check Failed. Please review Schedule D Line 8b math
- Schedule D Line 10 Check Failed. Please review Schedule D Line 10 math
- Schedule D Part 2 Check Failed. Please review Schedule D Part 2 math

SAVINGS OPPORTUNITIES FOR NEXT YEAR:

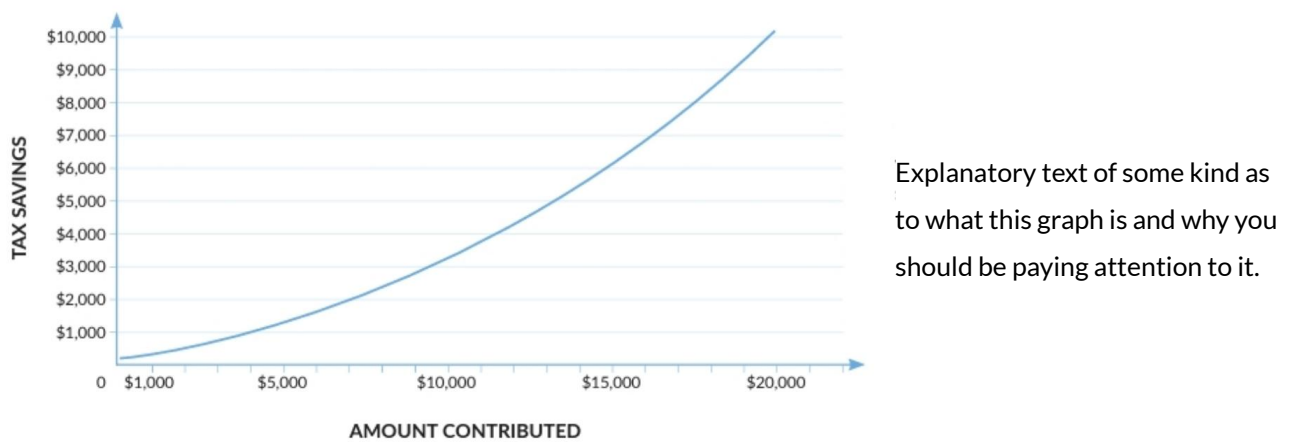
CONTRIBUTE TO YOUR IRA

Maximum Contribution: \$00,000.00	Tax Savings: \$00,000.00
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Maximum Contribution: \$00,000.00	Tax Savings: \$00,000.00
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What are we calling THIS GRAPH?



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SAVINGS OPPORTUNITIES FOR NEXT YEAR:

CONTRIBUTE TO YOUR IRA

Maximum Contribution: \$00,000.00Tax Savings: \$00,000.00

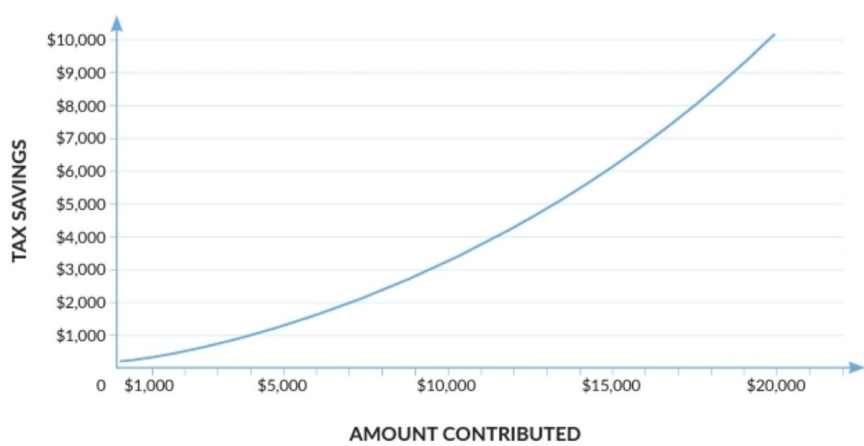
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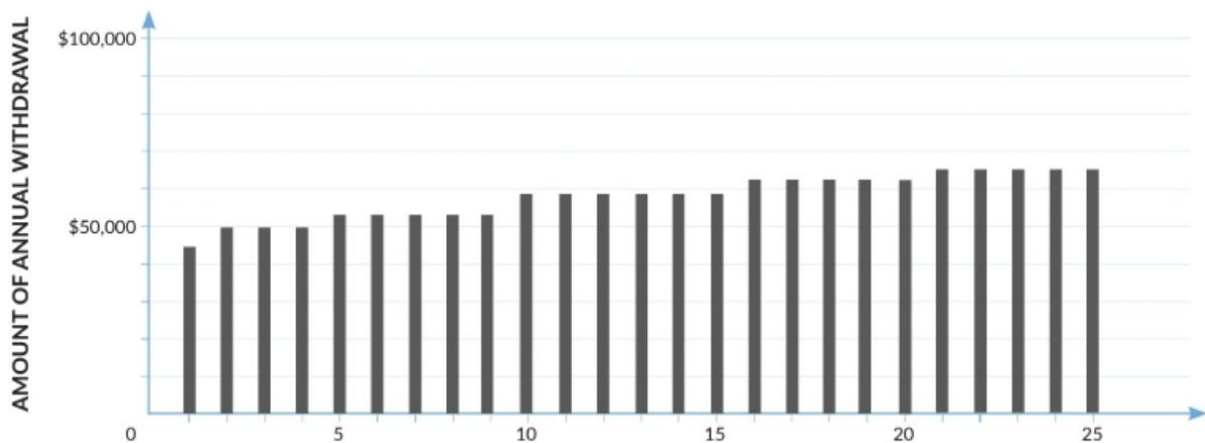
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Your Marginal Tax Brackets are as follows:

The rates for your capital gains and qualified dividend income are:

TAX RATE	TAXABLE INCOME BRACKET	TAX OWED
10.00%	\$0 to \$19,900	10% of taxable income
12.00%	\$19,901 to \$81,05	\$1,990 plus 12% of the amount over \$19,90
22.00%	\$81,051 to \$172,75	\$9,328 plus 22% of the amount over \$81,05
24.00%	\$172,751 to \$329,850	\$29,502 plus 24% of the amount over \$172,75
32.00%	329,851 to \$418,85	\$67,206 plus 32% of the amount over \$329,8
35.00%	\$418,851 to \$628,30	\$95,686 plus 35% of the amount over \$418,850
37.00%	\$628,301 or more	\$168,993.50 plus 37% of the amount over \$628,300

IRA Drawdown Strategy



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