

Department of the Treasury - Internal Revenue Service

U.S. Individual Income Tax Return*THIS IS A SIMULATED TAX RETURN FOR DEMONSTRATION PURPOSES ONLY***Filing Status and Taxpayer Information**Filing Status: **[X] Married Filing Jointly**

Your first name and middle initial: Bob Doe	Your social security number: 000-00-0000
Spouse's first name and middle initial: Jane Doe	Spouse's social security number: 000-00-0001
Home address: 456 Maple Street	
City, state, and ZIP: Nashville, TN 37215	

Income

1a	Total amount from Form(s) W-2, box 1	1a	\$160,000.00
1b	Household employee wages not reported on Form(s) W-2	1b	
1c	Tip income not reported on line 1a	1c	
1d	Medicaid waiver payments not reported on Form(s) W-2	1d	
1e	Taxable dependent care benefits from Form 2441, line 26	1e	
1f	Employer-provided adoption benefits from Form 8839, line 29	1f	
1g	Wages from Form 8919, line 6	1g	
1h	Other earned income	1h	
1i	Nontaxable combat pay election	1i	
1z	Add lines 1a through 1h	1z	\$160,000.00
2a	Tax-exempt interest	2a	
2b	Taxable interest	2b	\$385.00
3a	Qualified dividends	3a	
3b	Ordinary dividends	3b	
9	Total income. Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8	9	\$160,385.00

Adjustments to Income

10	Adjustments to income from Schedule 1, line 26	10	\$0.00
11	Adjusted gross income. Subtract line 10 from line 9	11	\$160,385.00

Tax and Credits

12	Standard deduction or itemized deductions (from Schedule A)	12	\$27,700.00
13	Qualified business income deduction from Form 8995 or 8995-A	13	\$0.00
14	Add lines 12 and 13	14	\$27,700.00
15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	\$132,685.00

Tax Computation

16	Tax (see instructions). Check if from: [] Form 8814 [] Form 4972 [] Other	16	\$19,805.70
17	Amount from Schedule 2, line 3	17	\$0.00
18	Add lines 16 and 17	18	\$19,805.70
19	Child tax credit or credit for other dependents from Schedule 8812	19	\$0.00
20	Amount from Schedule 3, line 8	20	\$0.00
21	Add lines 19 and 20	21	\$0.00
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	\$19,805.70
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	\$0.00

*This is a simulated tax return for demonstration purposes only.**Do not file this document with the IRS.*

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24	Total tax. Add lines 22 and 23	24	\$19,805.70
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Payments

25a	Federal income tax withheld from Form(s) W-2	25a	\$22,700.00
25b	Federal income tax withheld from Form(s) 1099	25b	\$0.00
25c	Other forms (see instructions)	25c	\$0.00
25d	Add lines 25a through 25c	25d	\$22,700.00
26	2023 estimated tax payments and amount applied from 2022 return	26	\$0.00
27	Earned income credit (EIC)	27	\$0.00
28	Additional child tax credit from Schedule 8812	28	\$0.00
29	American opportunity credit from Form 8863, line 8	29	\$0.00
31	Amount from Schedule 3, line 15	31	\$0.00
33	Total payments. Add lines 25d, 26, 27, 28, 29, 31, and 32	33	\$22,700.00

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount OVERPAID 34	\$2,894.30
35a	Amount of line 34 you want REFUNDED TO YOU	35a \$2,894.30
35b	Routing number: 064000017	Type: [X] Checking [] Savings
35d	Account number: ****4827	

Amount You Owe

37	Amount you owe. Subtract line 33 from line 24	37	\$0.00
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Sign Here (Joint return? Both must sign)

Your signature: Bob Doe	Date: 04/15/2024
Spouse's signature: Jane Doe	Date: 04/15/2024
Your occupation: Security Guard	Spouse's occupation: Teacher

U.S. Individual Income Tax Return*THIS IS A SIMULATED TAX RETURN FOR DEMONSTRATION PURPOSES ONLY***Tax Return Summary - For Reference Only****Income Summary**

Bob Doe - W-2 Wages (Acme Technology Corp)	\$95,000.00
Jane Doe - W-2 Wages (Metro Nashville Public Schools)	\$65,000.00
Interest Income (Savings Account)	\$385.00
Total Income	\$160,385.00

Deductions

Standard Deduction (Married Filing Jointly)	-\$27,700.00
Taxable Income	\$132,685.00

2023 Tax Calculation (Married Filing Jointly Brackets)

10% on first \$22,000	\$2,200.00
12% on \$22,001 - \$89,450 (\$67,450)	\$8,094.00
22% on \$89,451 - \$190,750 (\$43,235)	\$9,511.70
Total Federal Tax	\$19,805.70

Tax Payments (Withholdings)

Bob Doe - Federal Tax Withheld	\$14,250.00
Jane Doe - Federal Tax Withheld	\$8,450.00
Total Payments	\$22,700.00

REFUND DUE

Total Tax Liability	\$19,805.70
Total Payments	-\$22,700.00
REFUND AMOUNT	\$2,894.30

Effective Tax Rate: 12.3% | Marginal Tax Rate: 22%