

U.S. Individual Income Tax Return Summary

Tax Year 2023 - AI Tax Agent Prototype

Section 1: Personal Information

Name: Jani Miya Shaik

SSN: 123-45-6783

Filing Status: Married_Joint

Address: 6560 Montezuma road, Penthouse Apartments, San Diego, CA - 92115

Section 2: Income Summary

Wages: \$456.00

Interest: \$234.00

Dividends: \$221.00

Business Income: \$234.00

Other Income: \$21.00

Total Income: \$1,166.00

Section 3: Deductions & Credits

Deduction Type: Itemized

- Mortgage Interest: \$353.00
- State Taxes Paid: \$51.00
- Charitable Contributions: \$15.00
- Medical Expenses: \$124.00

Dependents: 12

Total Deductions: \$543.00

Section 4: Tax Calculation Result

Taxable Income: \$623.00

Tax Owed: \$50.30

Effective Tax Rate: 5.34%

Marginal Tax Rate: 10%

Disclaimer: This summary is generated by an AI Tax Agent Prototype. It is not a substitute for official IRS forms or professional advice.