

2023 Return Summary

STEVE & JILL ANDERSON

111-11-1111

	Federal	North Carolina
Adjusted Gross Income	1778331.	1778331.
Itemized or Standard Deduction	-27700.	-25500.
Taxable Income	1750631.	1752831.
Tax	577647.	83259.
Self-Employment Tax	23234.	
Additional Medicare Tax	11261.	
Net Investment Income Tax	8261.	
Income Tax Withheld	-74500.	0.
Estimated Tax Paid	-600000.	-87000.
Amount Overpaid	54097.	3741.
Amount Due <Refund>	-53097.	-3541.
Amount of Refund Credited to Next Year	1000.	200.

Additional Information:

Federal Tax Bracket

Average tax rate - 33.00%

Marginal tax rate - 37%

North Carolina Tax Bracket - 4.75%

2023 Return Summary

STEVE & JILL ANDERSON

111-11-1111

	Federal	North Carolina
Residency	Full Year	Full Year
Filing Status	Married-Joint	Married-Joint
Number of Dependents	0	0
E-file Requested	Yes	Yes
Due Date	04/15/2024	04/15/2024
Extended Due Date		
Direct Deposit	N/A	N/A
Electronic Withdrawal	N/A	N/A
Date Calculated	01/17/2024	01/17/2024
Time Calculated	23:10:16	23:10:16
Release Version	2023.02010	2023.02010
Date Exported		
Time Exported		
Export Version		

January 17, 2024

STEVE & JILL ANDERSON
1234 MAIN STREET
NEWPORT BEACH, CA 92660

Dear Mr. and Mrs. ANDERSON:

Enclosed are your 2023 income tax return and 2024 estimated tax vouchers.

Specific filing instructions are as follows.

FEDERAL INCOME TAX RETURN:

This return has been prepared for electronic filing and the practitioner PIN program has been elected. Please sign and return Form 8879 to our office. We will then transmit your return electronically to the IRS. If after three weeks you have not received your refund, you may contact the IRS at 1-800-829-4477.

A portion of your overpayment in the amount of \$1000 has been applied to your federal declaration of estimated tax. You will also receive a refund in the amount of \$53097.

FEDERAL ESTIMATED TAX VOUCHERS:

Separately mail voucher 1 of Form 1040-ES by April 15, 2024.

Internal Revenue Service
P.O. Box 802502
Cincinnati, OH 45280-2502

Enclose your check for \$159000, payable to the United States Treasury. Include your social security number and the words "2024 Form 1040-ES" on your check.

Retain vouchers 2, 3 and 4 in your files and mail to the above address on or before the dates indicated.

For your reference we have listed all estimated tax payments and their original due dates below. Vouchers requiring no payment should not be filed.

Voucher no. 1 by 04/15/24 \$159000

Voucher no. 2 by 06/17/24 \$160000

Voucher no. 3 by 09/16/24 \$160000

Voucher no. 4 by 01/15/25 \$160000

Your copy of the return is enclosed for your files. We suggest that you retain this copy indefinitely.

Very truly yours,

January 17, 2024

STEVE & JILL ANDERSON
1234 MAIN STREET
NEWPORT BEACH, CA 92660

Dear Mr. and Mrs. ANDERSON:

Enclosed is your 2023 Form(s) 114, Report of Foreign Bank and Financial Accounts.

Your Form 114 has been prepared for electronic filing. Please sign, date, and return Form 114A to our office. We will then transmit your form to the FinCEN.

Your copy of the form(s) is enclosed for your files. We suggest that you retain this copy indefinitely.

Very truly yours,

CAROLINE LYNN

January 17, 2024

STEVE & JILL ANDERSON
1234 MAIN STREET
NEWPORT BEACH, CA 92660

Dear Mr. and Mrs. ANDERSON:

Enclosed are your 2023 income tax returns and 2024 estimated tax vouchers, as follows...

2023 U.S. Individual Income Tax Return

2024 Federal Estimated Tax Vouchers

2023 Federal Report of Foreign Bank and Financial Accounts

2023 North Carolina Individual Income Tax Return

2024 North Carolina Estimated Tax Vouchers

Form(s) 114, Report of Foreign Bank and Financial Accounts, will be electronically filed with the FinCEN.

Your copy should be retained for your files.

Very truly yours,

CAROLINE LYNN

Filing Instructions

Prepared for:

STEVE & JILL ANDERSON
1234 MAIN STREET
NEWPORT BEACH, CA 92660

Prepared by:

HATFIELD & ASSOCIATES
8186 JACKSON RD., SUITE 100
ANN ARBOR, MI 48103

2023 U.S. INDIVIDUAL INCOME TAX RETURN

Amount to be refunded to you.....\$ 53097

This return has been prepared for electronic filing and the practitioner PIN program has been elected. Please sign and return Form 8879 to our office. We will then transmit your return electronically to the IRS. Do not mail the paper copy of the return to the IRS. If after three weeks you have not received your refund, you may contact the IRS at 1-800-829-4477.

2024 U.S. ESTIMATED INDIVIDUAL INCOME TAX

Estimated tax vouchers are due as follows:

\$ 159000 due by April 15, 2024
\$ 160000 due by June 17, 2024
\$ 160000 due by September 16, 2024
\$ 160000 due by January 15, 2025

Include your SSN and the words "2024 Form 1040-ES" on your check.

Mail on or before the due date to: Internal Revenue Service
P.O. Box 802502
Cincinnati, OH 45280-2502

REPORT OF FOREIGN BANK AND FINANCIAL ACCOUNTS - JOINT

Your Form 114 has been prepared for electronic filing. Please sign, date, and return Form 114A to our office. We will then transmit your form to the FINCEN.

Filing Instructions

Prepared for:

STEVE & JILL ANDERSON
1234 MAIN STREET
NEWPORT BEACH, CA 92660

Prepared by:

HATFIELD & ASSOCIATES
8186 JACKSON RD., SUITE 100
ANN ARBOR, MI 48103

2023 NORTH CAROLINA INCOME TAX RETURN

Amount to be refunded to you.....\$ 3541

This return has been prepared for electronic filing. If you wish to have it transmitted electronically to the NCDOR, please sign, date, and return Form 8879-SO to our office. We will then submit your electronic return to the NCDOR.

2024 NORTH CAROLINA ESTIMATED INCOME TAX

Estimated tax vouchers are due as follows:

\$ 20615 due by April 15, 2024
\$ 20815 due by June 17, 2024
\$ 20815 due by September 16, 2024
\$ 20815 due by January 15, 2025

Include your social security number on your check.

Mail on or before the due date to: N.C. Dept. of Revenue
P.O. Box 25000
Raleigh, NC 27640-0630