

MARRIED FILING JOINTLY

Tax Return Worksheet - Tax Year 20__

1. Personal Information

Primary Taxpayer Name:

SSN: _____

Spouse Name: _____

SSN: _____

Street Address: _____

City: _____

State: _____

ZIP Code: _____

2. Income

Line	Income Source	Primary Taxpayer	Spouse	Joint Total
1	Wages, salaries, tips (Form W-2)			
2	Taxable interest income (Form 1099-INT)			
3	Dividend income (Form 1099-DIV)			
4	Taxable IRAs/Pensions distributions			
5	Social Security benefits			
6	Capital gain or (loss) (Schedule D)			
7	Business income or (loss) (Schedule C)			
8	Other income			
9	Total Income (Add lines 1 through 8)			

3. Adjustments to Income (Gross Income Adjustments)

Line	Adjustment Type	Primary Taxpayer	Spouse	Joint Total
10	Educator expenses			
11	IRA deduction			
12	Student loan interest deduction			
13	Other adjustments			
14	Total Adjustments (Add lines 10 through 13)			
15	Adjusted Gross Income (Subtract line 14 total from line 9 total)			

4. Deductions & Taxable Income

16	Standard Deduction for Married Filing Jointly OR Total Itemized Deductions	
17	Taxable Income (Subtract line 16 from line 15)	

5. Tax, Credits & Payments

18	Total Tax (Calculated on taxable income, line 17)	
19	Nonrefundable Credits (Child tax credit, education credits, etc.)	
20	Net Tax (Subtract line 19 from line 18. Cannot be less than zero)	
21	Federal Income Tax Withheld (Forms W-2, 1099, etc.)	
22	Estimated Tax Payments / Refund Applied	
23	Total Payments (Add lines 21 and 22)	

6. Refund or Amount Owed		
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24	REFUND (If line 23 is greater than line 20, subtract line 20 from line 23)	
25	AMOUNT OWED (If line 20 is greater than line 23, subtract line 23 from line 20)	

Primary Taxpayer Signature:

Spouse Signature:

Date: _____

Date: _____