

ANNUAL TAX RETURN GUIDE

Filing Status: Married Filing Jointly

Tax Year: _____

1. Primary Taxpayer Information

First Name and Middle Initial

Last Name

Social Security Number (SSN)

Date of Birth

Occupation

2. Spouse Information

First Name and Middle Initial

Last Name

Social Security Number (SSN)

Date of Birth

Occupation

3. Home Address

Street Address (including apartment number)

City, Town, or Post Office

State

ZIP Code

4. Dependents

Dependent's Name (First, Last)	Social Security Number	Relationship	Child Tax Credit Eligibility

5. Combined Income Checklist

- ☐ W-2 Wages (Primary)
- ☐ W-2 Wages (Spouse)
- ☐ Interest Income (1099-INT)
- ☐ Dividend Income (1099-DIV)
- ☐ Retirement Plan Distributions (1099-R)
- ☐ Miscellaneous / Self-Employment Income (1099-NEC/MISC)

6. Signatures and Authorization

Under penalties of perjury, we declare that we have examined this return and accompanying schedules, and to the best of our knowledge and belief, they are true, correct, and complete. Accurate information is the responsibility of both spouses when filing jointly.

Primary Taxpayer's Signature

Date

Spouse's Signature

Date
