

JOINT FEDERAL INCOME TAX RETURN SPREADSHEET

Filing Status: Married Filing Jointly | Tax Year:

Primary Taxpayer

First Name & Initial:

Last Name:

Social Security No:

Spouse

First Name & Initial:

Last Name:

Social Security No:

1. INCOME

Income Category	Primary Taxpayer	Spouse	Joint Total
Wages, salaries, tips (Form W-2)			
Taxable interest (Form 1099-INT)			
Ordinary dividends (Form 1099-DIV)			
IRA distributions (Taxable amount)			
Pensions and annuities (Taxable amount)			
Social Security benefits (Taxable amount)			
Capital gain or loss (Schedule D)			
Other income / Business income (Schedule C/E/F)			
Total Income			

2. ADJUSTMENTS TO INCOME

Adjustment Category	Primary Taxpayer	Spouse	Joint Total
Educator expenses			
IRA deduction			
Student loan interest deduction			

Adjustment Category	Primary Taxpayer	Spouse	Joint Total
Health Savings Account (HSA) deduction			
Other adjustments (Schedule 1, Part II)			
Total Adjustments			
Adjusted Gross Income (AGI) (Total Income minus Total Adjustments)			

3. TAXABLE INCOME CALCULATION

Standard Deduction for Married Filing Jointly (or Itemized Deductions from Schedule A)		
Qualified business income deduction (Form 8995 or 8995-A)		
Total Deductions		
Taxable Income (AGI minus Total Deductions)		

4. TAX, CREDITS, AND PAYMENTS

Tax (calculated on Taxable Income amount)		
Child Tax Credit or Credit for Other Dependents		
Education credits (Form 8863)		
Other nonrefundable credits		
Net Tax (Tax minus Nonrefundable Credits)		
Other taxes (e.g., Self-employment tax)		
Total Tax Liability		
Federal income tax withheld (Forms W-2 and 1099)		
Estimated tax payments and amount applied from prior year		
Earned Income Credit (EIC)		
Additional Child Tax Credit		
Total Payments & Refundable Credits		

5. REFUND OR AMOUNT OWED

REFUND (If Total Payments is greater than Total Tax Liability)		
AMOUNT OWED (If Total Tax Liability is greater than Total Payments)		