

INDIVIDUAL INCOME TAX RETURN

Married Filing Jointly Portfolio

20

FILING STATUS: ☒ MARRIED FILING JOINTLY

PRIMARY TAXPAYER INFORMATION

FIRST NAME AND MIDDLE INITIAL

LAST NAME

SOCIAL SECURITY NUMBER (SSN)

DATE OF BIRTH

SPOUSE INFORMATION

SPOUSE'S FIRST NAME AND MIDDLE INITIAL

SPOUSE'S LAST NAME

SPOUSE'S SOCIAL SECURITY NUMBER (SSN)

SPOUSE'S DATE OF BIRTH

HOME ADDRESS

HOME ADDRESS (NUMBER AND STREET, OR P.O. BOX)

CITY, TOWN, OR POST OFFICE

STATE

ZIP CODE

INCOME & ADJUSTMENTS

Item	Income Category	Amount (\$)
1	Wages, salaries, tips, etc. (Attach Form(s) W-2)	
2	Taxable interest	
3	Ordinary dividends	
4	IRA distributions (Taxable amount)	
5	Pensions and annuities (Taxable amount)	
6	Social Security benefits (Taxable amount)	
7	Capital gain or (loss)	
8	Total Income (Add lines 1 through 7)	

Item	Income Category	Amount (\$)
9	Adjustments to income (From Schedule)	
10	Adjusted Gross Income (Subtract line 9 from line 8)	

TAX, CREDITS, AND PAYMENTS

11	Standard Deduction for Married Filing Jointly OR Itemized Deductions	
12	Taxable Income (Subtract line 11 from line 10)	
13	Tax (Including Alternative Minimum Tax)	
14	Child Tax Credit or Credit for Other Dependents	
15	Federal income tax withheld (From W-2/1099)	
16	Refund Amount (If line 15 is larger than line 13 minus 14)	
17	Amount You Owe (If line 13 minus 14 is larger than line 15)	

SIGN HERE

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. Joint return filing requires signatures of both spouses.

Your Signature

Date

Occupation

Spouse's Signature

Date

Spouse's Occupation