

Must be  
2023

**Form 1040** Department of the Treasury—Internal Revenue Service  
**U.S. Individual Income Tax Return** **2023** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2023, or other tax year

Your first name and middle initial

If joint return, spouse's first name and middle initial

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code

Foreign country name Foreign province/state/county Foreign postal code

**Filing Status**  Single  Married filing jointly (even if only one had income)  Head of household (HOH)  
 Married filing separately (MFS)  Qualifying surviving spouse (QSS)  
Check only one box.  
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: \_\_\_\_\_

**Digital Assets** At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)  Yes  No

**Standard Deduction** **Someone can claim:**  You as a dependent  Your spouse as a dependent  
 Spouse itemizes on a separate return or you were a dual-status alien

**Age/Blindness** You:  Were born before January 2, \_\_\_\_\_

**Dependents** (see instructions):  
(1) First name Last name  
If more than four dependents, see instructions and check here

**Income**  
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

|    |   |    |                            |
|----|---|----|----------------------------|
| 1a | Total amount from Form(s) W-2, _____  | 1b | _____                      |
| b  | Household employee wages not reported on Form(s) W-2 . . . . .  | 1c | _____                      |
| c  | Tip income not reported on line 1a (see instructions) . . . . .   | 1d | _____                      |
| d  | Medicaid waiver payments not reported on Form(s) W-2 (see instructions) . . . . .                       | 1e | _____                      |
| e  | Taxable dependent care benefits from Form 2441, line 26 . . . . .                                       | 1f | _____                      |
| f  | Employer-provided adoption benefits from Form 8839, line 29 . . . . .                                   | 1g | _____                      |
| g  | Wages from Form 8919, line 6 . . . . .  | 1h | _____                      |
| h  | Other earned income (see instructions) . . . . .  | 1i | _____                      |
| i  | Nontaxable combat pay election (see instructions) . . . . .   | 1z | _____                      |
| z  | Add lines 1a through 1h . . . . .   | 2a | _____                      |
| 2a | Tax-exempt interest . . . . .   | 2b | _____                      |
| 3a | Qualified dividends . . . . .   | 3a | _____                      |
| 4a | IRA distributions . . . . .   | 4a | _____                      |
| 5a | Pensions and annuities . . . . .  | 5a | _____                      |
| 6a | Social security benefits . . . . .  | 6a | _____                      |
| c  | If you elect to use the lump-sum election method, check here (see instructions) . . . . .               | b  | Taxable interest . . . . . |
| 7  | Capital gain or (loss). Attach Schedule D if required. If not required, check here . . . . .            | 2b | _____                      |
| 8  | Additional income from Schedule 1, line 10 . . . . .  | 3b | _____                      |
| 9  | Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total</b> . . . . .                         | 4b | _____                      |
| 10 | Adjustments to income from Schedule 1, line 26 . . . . .  | 5b | _____                      |
| 11 | Subtract line 10 from line 9. This is your <b>adjusted gross income</b> . . . . .                       | 6b | _____                      |
| 12 | <b>Standard deduction or itemized deductions</b> (from Schedule 1) . . . . .                            | 7  | _____                      |
| 13 | Qualified business income deduction from Form 8995 or Form 8995-E, line 10 . . . . .                    | 8  | _____                      |
| 14 | Add lines 12 and 13 . . . . .   | 9  | _____                      |
| 15 | Subtract line 14 from line 11. If zero or less, enter -0-. This is your <b>taxable income</b> . . . . . | 10 | _____                      |
|    |   | 11 | _____                      |
|    |   | 12 | _____                      |
|    |   | 13 | _____                      |
|    |   | 14 | _____                      |
|    |   | 15 | _____                      |

**Standard Deduction for—**  
• Single or Married filing separately, \$13,850  
• Married filing jointly or Qualifying surviving spouse, \$27,700  
• Head of household, \$20,800  
• If you checked any box under Standard Deduction, see instructions.

Attach Sch. B if required.

**Adjusted Gross Income (AGI) is on line 11**

**If you an INDEPENDENT STUDENT, your name must appear here**

**If you are a DEPENDENT STUDENT, your name must appear on one of these lines**  
**NOTE If you're Dependent and file separately from your parent(s), provide your own tax doc AND your parent's doc**

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form 1040 (2023)

Important: Please redact all Social Security Numbers

**Must include  
page 2\***

| Form 1040 (2023)  |  | Page <b>2</b>   |                                      |   |
|---|--|---|--------------------------------------|---|
| <b>Tax and Credits</b>  | <b>16</b> Tax (see instructions). Check if any from Form(s): <b>1</b> <input type="checkbox"/> 8814 <b>2</b> <input type="checkbox"/> 4972 <b>3</b> <input type="checkbox"/>   |   | <b>16</b>                            |   |
|   | <b>17</b> Amount from Schedule 2, line 3   |   | <b>17</b>                            |   |
|   | <b>18</b> Add lines 16 and 17  |   | <b>18</b>                            |   |
|   | <b>19</b> Child tax credit or credit for other dependents from Schedule 8812   |   | <b>19</b>                            |   |
|   | <b>20</b> Amount from Schedule 3, line 8   |   | <b>20</b>                            |   |
|   | <b>21</b> Add lines 19 and 20  |   | <b>21</b>                            |   |
|   | <b>22</b> Subtract line 21 from line 18. If zero or less, enter -0-  |   | <b>22</b>                            |   |
|   | <b>23</b> Other taxes, including self-employment tax, from Schedule 2, line 21   |   | <b>23</b>                            |   |
|   | <b>24</b> Add lines 22 and 23. This is your <b>total tax</b>   |   | <b>24</b>                            |   |
|   | <b>Payments</b>  | <b>25</b> Federal income tax withheld from:                                       |                                      |   |
| <b>a</b> Form(s) W-2  |  | <b>25a</b>  |                                      |   |
| <b>b</b> Form(s) 1099   |  | <b>25b</b>  |                                      |   |
| <b>c</b> Other forms (see instructions)   |  | <b>25c</b>  |                                      |   |
| <b>d</b> Add lines 25a through 25c  |  | <b>25d</b>  |                                      |   |
| <b>26</b> 2023 estimated tax payments and amount applied from 2022 return                                 |  |   | <b>26</b>                            |   |
| <b>27</b> Earned income credit (EIC)  |  | <b>27</b>   |                                      |   |
| <b>28</b> Additional child tax credit from Schedule 8812  |  | <b>28</b>   |                                      |   |
| <b>29</b> American opportunity credit from Form 8863, line 8  |  | <b>29</b>   |                                      |   |
| <b>30</b> Reserved for future use   |  | <b>30</b>   |                                      |   |
| <b>31</b> Amount from Schedule 3, line 15   |  | <b>31</b>   |                                      |   |
| <b>32</b> Add lines 27, 28, 29, and 31. These are your <b>total other payments and refundable credits</b> |  |   | <b>32</b>                            |   |
| <b>33</b> Add lines 25d, 26, and 32. These are your <b>total payments</b>                                 |  |   | <b>33</b>                            |   |
| <b>Refund</b>   | <b>34</b> If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b>   |   | <b>34</b>                            |   |
|   | <b>35a</b> Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here <input type="checkbox"/>   |   | <b>35a</b>                           |   |
|   | <b>b</b> Routing number  | <b>c</b> Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings |                                      |   |
|   | <b>d</b> Account number  |   |                                      |   |
|   | <b>36</b> Amount of line 34 you want <b>applied to your 2024 estimated tax</b>   | <b>36</b>   |                                      |   |
| <b>Amount You Owe</b>   | <b>37</b> Subtract line 33 from line 24. This is the <b>amount you owe</b> .<br>For details on how to pay, go to <a href="http://www.irs.gov/Payments">www.irs.gov/Payments</a> or see instructions  |   | <b>37</b>                            |   |
|   | <b>38</b> Estimated tax penalty (see instructions)   | <b>38</b>   |                                      |   |
| <b>Third Party Designee</b>   | Do you want to allow another person to discuss this return with the IRS? See instructions <input type="checkbox"/> <b>Yes</b> . Complete below. <input type="checkbox"/> <b>No</b>   |   |                                      |   |
|   | Designee's name  | Phone no.   | Personal identification number (PIN) |   |
|   |  |   |                                      |   |
| <b>Sign Here</b>  | Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge. |   |                                      |   |
|   | Your signature   | Date  | Your occupation                      | If the IRS sent you an Identity Protection PIN, enter it here (see inst.)         |
|   | Spouse's signature. If a joint return, <b>both</b> must sign.  | Date  | Spouse's occupation                  | If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) |
|   | Phone no.  | Email address   |                                      |   |
|   | Preparer's name  | Preparer's signature  | Date                                 | PTIN  |
| <b>Paid Preparer Use Only</b>   | Check if: <input type="checkbox"/> Self-employed   |   |                                      |   |
|   | Firm's name  | Phone no.   |                                      |   |
|   | Firm's address   | Firm's EIN  |                                      |   |

Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information. Form **1040** (2023)

**\* If your family files a 1040-SR version, you must include pages 1, 2, and 3 of the 1040 form**