

Form 1040 U.S. Individual Income Tax Return 2023

Department of the Treasury-Internal Revenue Service

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 beginning \_\_\_\_\_, 2023, ending \_\_\_\_\_

See separate instructions.

Personal information section including names (JOHN, JANE), social security numbers (111-22-3333, 111-33-4444), address (HARKER HEIGHTS, TX, 76548), and marital status (Married filing jointly).

Filing Status section with options for Single, Married filing jointly (checked), Married filing separately, Head of household, and Qualifying surviving spouse.

Digital Assets section asking if the taxpayer received or disposed of a digital asset during 2023.

Standard Deduction section with options for claiming as dependent, spouse, or dual-status alien.

Age/Blindness section with checkboxes for being born before 1959 and being blind.

Table for Dependents listing names (JACK, TIM), social security numbers, relationships (SON), and tax credit eligibility.

Income section table with rows 1a through 1z, showing total amount from Form(s) W-2 as 600,000.

Table for tax-exempt interest (2a), qualified dividends (3a), IRA distributions (4a), pensions (5a), and social security benefits (6a).

Table for taxable interest (2b), ordinary dividends (3b), taxable amounts (4b, 5b, 6b), capital gain (7), total income (9), adjusted gross income (11), standard deduction (12), and taxable income (15) of 572,300.

<b>Tax and Credits</b>	<b>16</b>	<b>Tax</b> (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	<b>16</b>	<b>144,094</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>144,094</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>0</b>
	<b>22</b>	Subtract line 21 from line 18. If zero or less, enter -0-	<b>22</b>	<b>144,094</b>
	<b>23</b>	Other taxes, including self-employment tax, from Schedule 2, line 21	<b>23</b>	<b>3,150</b>
	<b>24</b>	Add lines 22 and 23. This is your <b>total tax</b>	<b>24</b>	<b>147,244</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>3,600</b>
	<b>d</b>	Add lines 25a through 25c	<b>25d</b>	<b>3,600</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>0</b>
	<b>33</b>	Add lines 25d, 26, and 32. These are your <b>total payments</b>	<b>33</b>	<b>3,600</b>

If you have a qualifying child, attach Sch. EIC.

<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>0</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>0</b>
Direct deposit? See instructions.	<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> . 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>143,644</b>
	<b>38</b>	Estimated tax penalty (see instructions)	<b>38</b>	

**Third Party Designee** Do you want to allow another person to discuss this return with the IRS? See instructions  Yes. Complete below.  **No**

Designee's name \_\_\_\_\_ Phone no. \_\_\_\_\_ Personal identification number (PIN) [ ] [ ] [ ] [ ] [ ] [ ]

**Sign Here** 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 _____		

**Paid Preparer Use Only**

Preparer's signature _____	Date <b>11-27-2024</b>	PTIN <b>P01073338</b>	Check if: <input type="checkbox"/> Self-employed
Preparer's name <b>Derland G Bahr CPA</b>	Phone no. <b>254-432-5724</b>		
Firm's name <b>Derland Bahr CPA Inc</b>			
Firm's address <b>581 Pan American Drive Ste 7 Harker Heights, TX 76548</b>	Firm's EIN <b>82-3840304</b>		

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