

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 options.

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 sold digital assets during 2023.

Standard Deduction section with options for claiming someone as a dependent or spouse itemizes on a separate return.

Age/Blindness section with checkboxes for being born before January 2, 1959 or being blind.

Dependents table with columns for name, social security number, relationship, and child tax credit. Lists JACK and TIM as dependents.

Income section table with rows 1a through 1z. Total amount from Form(s) W-2 is 6,000,000. Add lines 1a through 1h to reach 6,000,000.

Income section table (continued) with rows 2a through 15. Includes tax-exempt interest, qualified dividends, IRA distributions, pensions, social security benefits, capital gain, and final taxable income of 5,972,300.

Tax and Credits

Table with 2 columns: Line number and Amount. Rows 16-24 showing tax calculations and total tax of 2,191,415.

Payments

Table with 2 columns: Line number and Amount. Rows 25-33 showing federal income tax withheld, EIC, and total payments of 52,200.

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

Refund

Table with 2 columns: Line number and Amount. Rows 34-36 showing refund amount of 0 and amount applied to 2024 estimated tax.

Amount You Owe

Table with 2 columns: Line number and Amount. Rows 37-38 showing amount you owe of 2,139,215 and estimated tax penalty.

Third Party Designee

Form section for Third Party Designee with fields for name, phone, and PIN. Includes a declaration to allow another person to discuss the return with the IRS.

Sign Here

Signature section with fields for taxpayer and spouse signatures, dates, and occupations. Includes a declaration under penalties of perjury.

Paid Preparer Use Only

Form section for Paid Preparer Use Only with fields for preparer name (Derland G Bahr CPA), firm name (Derland Bahr CPA Inc), address, date, PTIN, and phone number.