

Filing Status Optimization Report

2017

Name(s) as shown on return

Your Social Security Number

	Taxpayer Filing Separately	Spouse Filing Separately	Combined Filing Separately	Joint Return	Net effect of Filing Separately
Federal:					
Total Income	_____	_____	_____	_____	_____
Total Adjustments	_____	_____	_____	_____	_____
Adjusted Gross Income	_____	_____	_____	_____	_____
Itemized Deductions	_____	_____	_____	_____	_____
Standard Deduction	_____	_____	_____	_____	_____
Exemptions	_____	_____	_____	_____	_____
Taxable Income	_____	_____	_____	_____	_____
Tax Before Credits	_____	_____	_____	_____	_____
Credits*	_____	_____	_____	_____	_____
Tax After Credits	_____	_____	_____	_____	_____
Other Taxes	_____	_____	_____	_____	_____
Total Tax	_____	_____	_____	_____	_____
Withholding	_____	_____	_____	_____	_____
Earned Income Credit	_____	_____	_____	_____	_____
Additional Child Tax Cr.	_____	_____	_____	_____	_____
Other Payments	_____	_____	_____	_____	_____
Estimated Tax Penalty	_____	_____	_____	_____	_____
Federal Ref (Bal Due)	_____	_____	_____	_____	_____

State Totals:

State Ref (Bal Due) _____

Net ref (Bal due) _____

Fed marginal tax rate	%	%		%	
Projected 2016 monthly Part B Medicare premium	_____	_____	_____	_____	_____

*There may be some credits present in the return that the program cannot split properly for this report. The credits will be calculated properly in the split files. Review the split files carefully to ensure that all information is correct.