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2015 At a Glance

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Adjusted Gross Income: \$54,090

Name (Shown On Tax):
Sara Beth Thompson

Tax Owed: \$0.00

Filing Status:
[Head of Household](#)

Refund: \$7,412

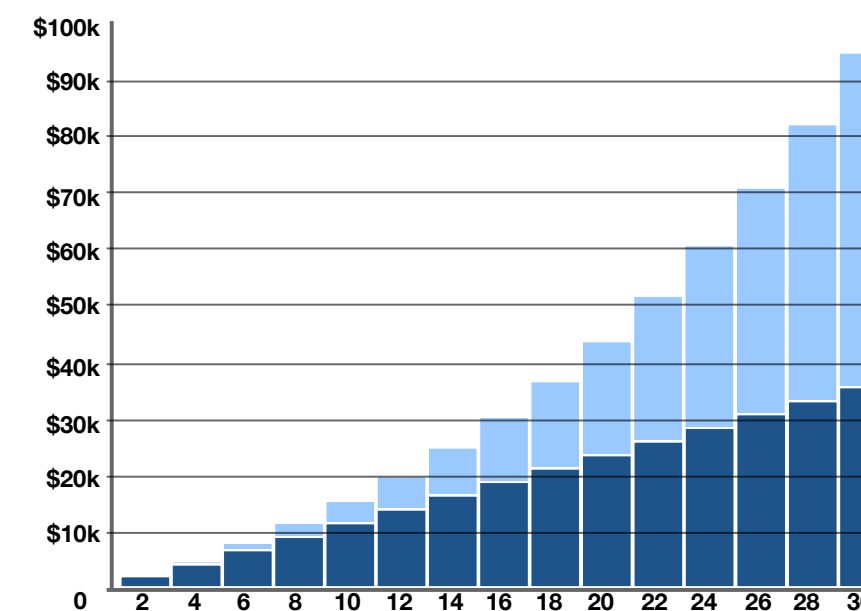
Status:

\$500 was deposited directly into
account xxxxxx2345 on May 5th, 2015

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Planning Your Financial Future

- > Money Contributed to some types of [retirement accounts](#) is not taxed until after you retire
- > 7 in 10 working Americans say that they could save \$25 more per week that they are currently saving per month toward retirement. [2015 Retirement Confidence Survey](#)



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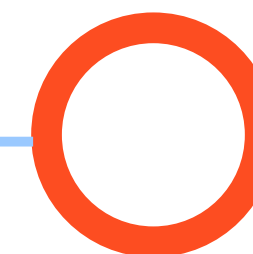
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[Prepare For 2016 Taxes](#)



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2015 Tax Details

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Income

Wages, Salaries, Tips, etc.: \$60,000
 Other Income: \$1,500
 Taxable Interest Income: Sch B: \$90
 Tax-exempt Interest: \$0
 Ordinary Dividend Income: Sch B: \$0
 Business Income or Loss (Schedule C): \$0
 Capital Gain or Loss: (Schedule D): \$0
 Capital Gains or Losses (Form 4797): \$0
 Total Ira Distributions: \$0
 Total Pensions and Annuities: \$0
 Taxable Pension and Annuities: \$0
 Taxable Pension/annuity Amount: \$0
 Rent/royalty/partnership/estate (Schedule E): \$0
 Total Social Security Benefits: \$0
 Taxable Social Security Benefits: \$0

[Show less](#)**Total Income**
\$61,590**Refund**
\$7,412**Amount Owed**
\$0.00**How Tax Is Calculated**

Adjustments

Itemized Deductions: \$7,500

Medical/dental
 Medical and Dental Expenses: \$500
 Adjusted Gross Income Percentage: 1%
 Net Medical Deduction: \$500
 Taxes Paid: \$0

Interest Paid: \$6000
 Mortgage Interest (Individual): \$6000
 Deductible Points: 0
 Qualified Mortgage Insurance Premiums: \$1000
 Deductible Investment Interest: \$0
 Total Interest Deduction: \$7000

Charitable Contributions: \$0**Other Miscellaneous: \$0****Other Adjustments: \$0**[Show more](#)**Total Adjustments**
\$7,500**Adjusted Gross Income**
\$54,090

Credits

Tax Credits
 Child & Dependent Care Credit: \$600
 Child Tax Credit: \$1,000

Other Taxes[Show more](#)**Total Credits**
\$1,600

Payments

Tax Withheld: \$11,000
 Federal Income Tax Withheld: \$11,000

Other Taxes: \$0[Show more](#)**Total Payments**
\$11,000**Profit or Loss From Business –Schedule C: \$0**[Show more](#)**Self-Employment Tax –Schedule SE: \$0**[Show more](#)**Earned Income Credit –Schedule EIC: \$0**[Show more](#)**Education Credits –Form 8863: \$0**[Show more](#)**Form 8962**[Show more](#)



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2015 At a Glance

Personal Info

Name (Shown On Tax): Sara Beth Thompson

Filing Status: Head of Household

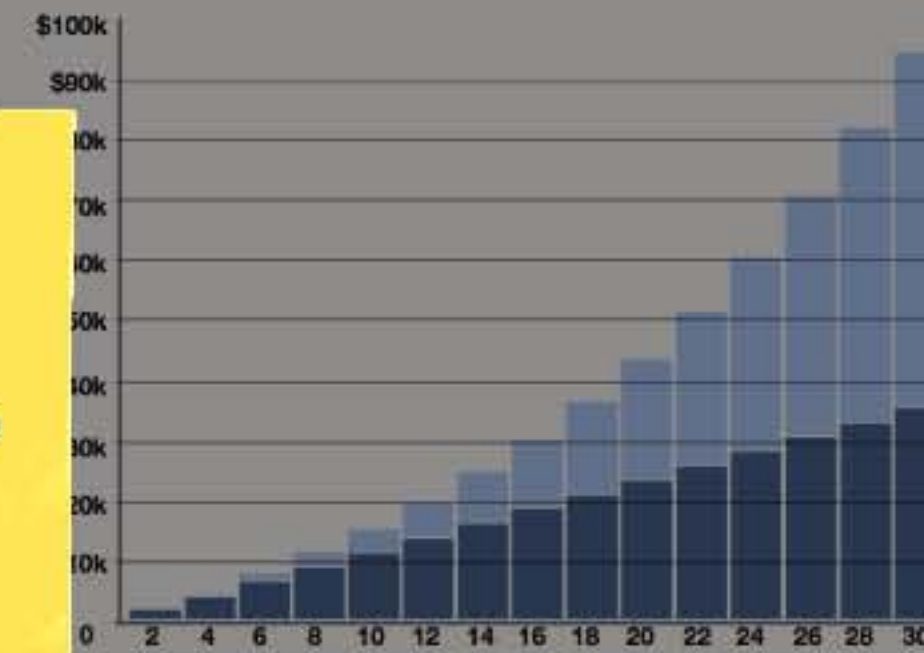
Adjusted Gross Income: \$54,090
Tax Owed: \$0.00

\$500 was deposited into account xxxxxx2345 on M

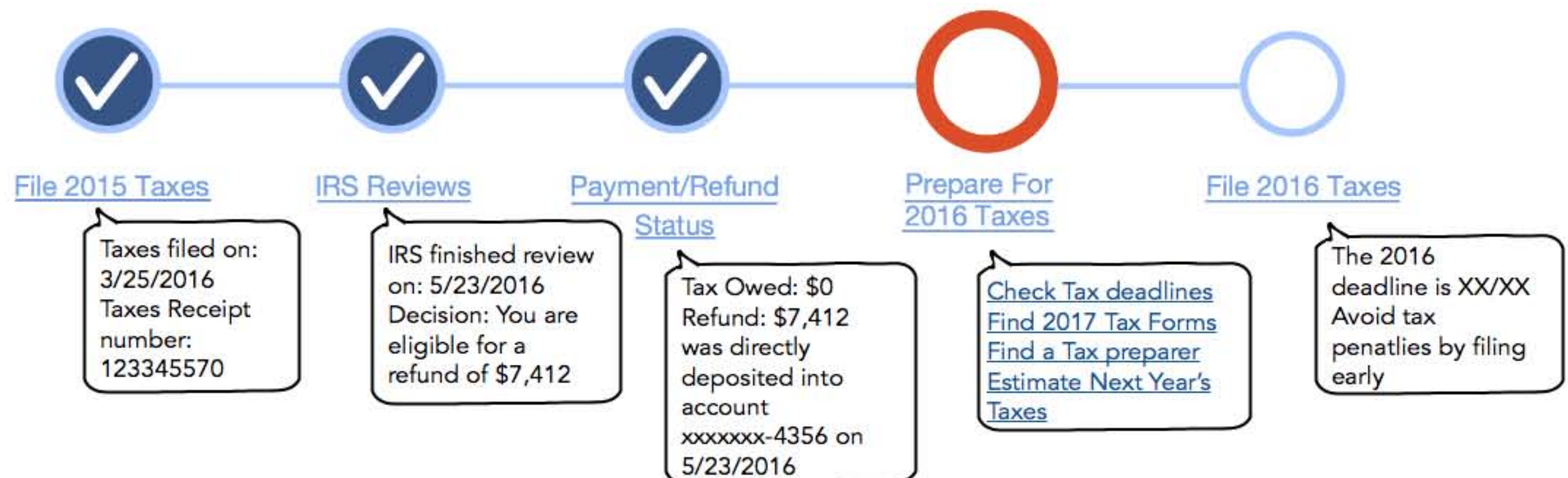
As the user hovers over each timeline item, the following tooltips will appear to give relevant information

Planning Your Financial Future

- > Money Contributed to some types of retirement accounts is not taxed until after you retire
- > 7 in 10 working Americans say that they could save \$25 more per week that they are currently saving per month toward retirement. 2015 Retirement Confidence Survey



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Planning for Financial Milestones

[2015](#) > Financial Planning

Your upcoming financial plans could impact your tax situation. Which of the following are you looking forward to?

Buying a Home



Owning a Business



Saving for Retirement



Drawing Retirement Benefits



Education Spending



Living Internationally



Expanding Your Family



Military Service



Making Charitable Donations

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2015 Household Info

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Name(s) Shown on Return

Self: Sarah Beth Thompson**Spouse: NA****Tax Payer SSN: 000-00-1010****Spouse SSN: NA****Address: 1010 N Glebe Rd, Arlington, VA 22201****Filing Status: Head of Household**

Number of Exemptions: 3

Dependent 1 Name: Alex B. Thompson**Dependent 1 SSN: 000-00-2010****Dependent 2 Name: James M. Thompson****Dependent 2 SSN: 000-00-2030**

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Prepare for 2016 Taxes

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Tax planning is a year-round process, not just something that happens once a year. Take advantage of this annual check-in to see what you can be doing throughout the year to maximize your tax readiness and improve your financial health.

[Calculate Withholding Amount](#)[Keep Track of Self-Reported Income](#)[Estimate Quarterly Tax Payments](#)[Find a Tax Preparer](#)[Top 10 Tips for Filing Taxes](#)[Important Deadlines](#)[Tax Considerations for Financial Planning](#)[+See More Tips](#)


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How Taxes are Calculated

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<p><u>Total Income</u></p> <p>\$61,590</p> <p><small>From your wages, tips, and other sources of income</small></p>	-	<p><u>Adjustments</u></p> <p>\$0</p> <p><small>Including all adjustments to income</small></p>	-	<p><u>Deductions</u></p> <p>\$7,500</p> <p><small>Including all deductions</small></p>	=	<p><u>AGI</u></p> <p>\$54,090</p> <p><small>Adjusted Gross Income</small></p>
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<p><u>AGI</u></p> <p>\$54,090</p> <p><small>Adjusted Gross Income</small></p>	-	<p><u>Exemptions</u></p> <p>\$19,500</p> <p><small>Depending on the number of people in the household</small></p>	=	<p><u>Taxable Income</u></p> <p>\$34,590</p> <p><small>Based on your AGI minus exemptions</small></p>
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<p><u>Tax Paid</u></p> <p>\$11,000</p> <p><small>Federal tax withheld and other payments</small></p>	-	<p><u>Tax Owed</u></p> <p>\$5,188</p> <p><small>Based on your taxable income bracket and filing status</small></p>	+	<p><u>Credits</u></p> <p>\$1,600</p> <p><small>Including tax credits and other taxes</small></p>	=	<p><u>Balance</u></p> <p>+\$7,412</p> <p><small>(+): Refund, (-): Tax Owed</small></p>
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Note: The information contained within this infographic is simply used for demonstration purposes. The goal of this page is to show taxpayers how their taxes are calculated in a graphical, understandable format. Our team would work with appropriate tax authorities to develop this guide and to verify the accuracy of the content.

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