

# Tax Resources – update every October

## Deadlines

2024

January

16 – Fourth quarter 2023 estimated tax due

31 – Deadline for employers to provide copies of Forms W-2 and 1099 for 2023 to employees.

February

15 – If you claimed exemption from income tax withholding last year on the Form W-4 you gave your employer, you must file a new Form W-4 by February 15 to continue your exemption for another year.

March

1 – Deadline for farmers and fishermen who have a balance due on their taxes to file their 2023 individual income tax returns and pay the balance due without penalties.

15 – Deadline for 2023 S corporation tax returns (Form 1120-S) or to request an extension using Form 7004.

15 – Deadline to file 2023 partnership tax returns (Form 1065) or to request an automatic extension (Form 7004).

April

15 – Deadline to file 2023 individual income tax returns (Form 1040) and any taxes owed, or to file for an automatic 6-month extension.

15 – Last day to contribute to a traditional IRA, Roth IRA, or SEP-IRA for the 2023 tax year.

15 – First quarter 2024 estimated tax due. Use Form 1040-ES.

15 – Deadline to file 2023 trust tax returns (Form 1041) or to request an automatic extension.

15 – Deadline to file 2023 corporate tax returns (Form 1120) or to request an automatic extension (Form 7004).

June

17 – Deadline for U.S. citizens living abroad to file individual tax returns and pay any tax, interest, and penalties due, or to request a 4-month extension (Form 4868).

17 – Second quarter 2024 estimated tax due. Use Form 1040-ES.

September

16 – Third quarter 2024 estimated tax due. Use Form 1040-ES.

16 – Final deadline to file 2023 partnership tax return if you were given a 6-month extension.

16 – Final deadline to file 2023 S corporation tax return if you were given a 6-month extension.

October

1 – Deadline for existing employers to establish a SIMPLE IRA plan.

15 – If you were given a 6-month extension to file your income tax return for 2023, file Form 1040 and pay any tax, interest, and penalties due.

15 – Final deadline to file 2023 corporate tax return if were given a 6-month extension.

## Forms and Instructions

### Federal Tax Forms

Here you can view, print, or save commonly used tax forms and accompanying instructions for completing the forms. The links below will take you to the Internal Revenue Service website.

<b>Form</b>	<b>Description</b>	<b>Instructions</b>
<a href="#">1040</a>	U.S. Individual Income Tax Return	<a href="#">Instructions</a>
<a href="#">Sch A</a>	Itemized Deductions	<a href="#">Instructions</a>
<a href="#">Sch B</a>	Interest and Ordinary Dividends	n/a
<a href="#">Sch C</a>	Profit and Loss from Business	<a href="#">Instructions</a>
<a href="#">Sch D</a>	Capital Gains and Losses	<a href="#">Instructions</a>
<a href="#">Sch E</a>	Supplemental Income and Loss	<a href="#">Instructions</a>
<a href="#">Sch EIC</a>	Earned Income Credit	n/a
<a href="#">Sch F</a>	Profit and Loss from Farming	<a href="#">Instructions</a>
<a href="#">Sch H</a>	Household Employment Taxes	<a href="#">Instructions</a>
<a href="#">Sch J</a>	Farm Income Averaging	<a href="#">Instructions</a>
<a href="#">Sch R</a>	Credit for the Elderly or the Disabled	<a href="#">Instructions</a>
<a href="#">Sch SE</a>	Self-Employment Tax	<a href="#">Instructions</a>
<a href="#">W-4</a>	Employee's Withholding Allowance Certificate	n/a
<a href="#">W-4P</a>	Withholding Certificate for Pension or Annuity Payments	n/a
<a href="#">W9</a>	Request for Taxpayer Identification Number and Certification	<a href="#">Instructions</a>

**Form**    **Description**

**Instructions**

## Federal Tax rates [TY]

These figures are for the 2023 tax year. Find your tax rate below.

### Filing Status : Single

If taxable income is over:	But not over:	The tax is:
\$0	\$11,600	10% of the taxable income
\$11,600	\$47,150	\$1,160.00 plus 12% of the amount over \$11,600
\$47,150	\$100,525	\$5,426.00 plus 22% of the amount over \$47,150
\$100,525	\$191,950	\$17,168.50 plus 24% of the amount over \$100,525
\$191,950	\$243,725	\$39,110.50 plus 32% of the amount over \$191,950
\$243,725	\$609,350	\$55,678.50 plus 35% of the amount over \$243,725
\$609,350	no limit	\$183,647.25 plus 37% of the amount over \$609,350

### Filing Status : Married filing Jointly or Qualifying Surviving Spouse

If taxable income is over:	But not over:	The tax is:
\$0	\$23,200	10% of the taxable income
\$23,200	\$94,300	\$2,320.00 plus 12% of the amount over \$23,200
\$94,300	\$201,050	\$10,852.00 plus 22% of the amount over \$94,300
\$201,050	\$383,900	\$34,337.00 plus 24% of the amount over \$201,050
\$383,900	\$487,450	\$78,221.00 plus 32% of the amount over \$383,900
\$487,450	\$731,200	\$111,357.00 plus 35% of the amount over \$487,450
\$731,200	no limit	\$196,669.50 plus 37% of the amount over \$731,200

### Filing Status : Married filing Separately

If taxable income is over:	But not over:	The tax is:
\$0	\$11,000	10% of the taxable income
\$11,000	\$44,725	\$1,100.00 plus 12% of the amount over \$11,000
\$44,725	\$95,375	\$5,147.00 plus 22% of the amount over \$44,725
\$95,375	\$182,100	\$16,290.00 plus 24% of the amount over \$95,375
\$182,100	\$231,250	\$37,104.00 plus 32% of the amount over \$182,100
\$231,250	\$346,875	\$52,832.00 plus 35% of the amount over \$231,250
\$346,875	no limit	\$93,300.75 plus 37% of the amount over \$346,875

### Filing Status : Head of Household

If taxable income is over:	But not over:	The tax is:
\$0	\$15,700	10% of the taxable income
\$15,700	\$59,850	\$1,570.00 plus 0% of the amount over \$15,700