

Where To Find My 2023 Tax Information (2025–26)

<https://studentaid.gov/2526/help/find-tax-information>

If you are a U.S. tax filer, you may be asked to manually enter financial information from your 2023 tax return. The information we request will vary based on your responses.

The list shows information you may be asked to provide, and where to find it on the 2023 IRS Form 1040.

1. Filing Status
2. Income Earned from Work (Line 1z plus Schedule 1: Lines 3 + 6)
3. Tax Exempt Interest Income (Line 2a)
4. Untaxed Portions of IRA Distributions (Line 4a minus 4b)
5. Untaxed Portions of Pensions (Line 5a minus 5b)
6. Adjusted Gross Income (Line 11)
7. Income Tax Paid (Line 24)
8. Deductible Payments to IRA/Keogh/other (Schedule 1, total of Lines 16 + 20)
9. Education Credits (Schedule 3, Line 3 + 1040 Line 29)
10. Net Profit or Loss From Schedule C (Schedule C: Line 31)
11. Foreign earned income exclusion (Schedule 1: Line 8d)

Form 1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return 2023 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 _____, 2024. See separate instructions.

Your first name and middle initial _____ Last name _____ Your social security number _____
If joint return, spouse's first name and middle initial _____ Last name _____ Spouse's social security number _____

Home address (number and street). If you have a P.O. box, see instructions. _____ Apt. no. _____
City, town, or post office. If you have a foreign address, also complete spaces below. _____ State _____ ZIP code _____
Foreign country name _____ Foreign province/state/county _____ Foreign postal code _____

Filing Status ☐ Single ☐ Married filing jointly (even if only one had income) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
Check only one box. ☐ Married filing separately (MFS) ☐ If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☐ No

Standard Deduction ☐ Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent ☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☐ Were born before January 2, 1959 ☐ Are blind **Spouse:** ☐ Was born before January 2, 1959 ☐ Is blind

Dependents (see instructions):
(i) First name Last name (ii) Social security number (iii) Relationship to you (iv) Check the box if qualifies for (see instructions):
Child tax credit Credit for other dependents

Income
1a Total amount from Form(s) W-2, box 1 (see instructions) 1a
b Household employee wages not reported on Form(s) W-2 1b
c Tip income not reported on line 1a (see instructions) 1c
d Medicaid waiver payments not reported on Form(s) W-2 (see instructions) 1d
e Taxable dependent care benefits from Form 2441, line 26 1e
f Employer-provided adoption benefits from Form 8839, line 29 1f
g Wages from Form 8919, line 6 1g
h Other earned income (see instructions) 1h
i Nontaxable combat pay election (see instructions) 1i

Standard Deduction for
2a Tax-exempt interest 2a
3a Qualified dividends 3a
4a IRA distributions 4a
5a Pensions and annuities 5a
6a Social security benefits 6a
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here 7
8 Additional income from Schedule 1, line 10 8
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** 9
10 Adjustments to income from Schedule 1, line 26 10
11 Subtract line 10 from line 9. This is your **adjusted gross income** 11
12 Standard deduction or itemized deductions (from Schedule A) 12
13 Qualified business income deduction from Form 8995 or Form 8995-A 13
14 Add lines 12 and 13 14
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income** 15

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 113208 Form 1040 (2023)

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Tax and Credits

16 Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐ 16

17 Amount from Schedule 2, line 3 17

18 Add lines 16 and 17 18

19 Child tax credit or credit for other dependents from Schedule 8812 19

20 Amount from Schedule 3, line 8 20

21 Add lines 19 and 20 21

22 Subtract line 21 from line 18. If zero or less, enter -0- 22

23 Other taxes, including self-employment tax, from Schedule 2, line 21 23

24 Add lines 22 and 23. This is your total tax 24

Payments

25 Federal income tax withheld from:

a Form(s) W-2 25a

b Form(s) 1099 25b

c Other forms (see instructions) 25c

d Add lines 25a through 25c 25d

26 2023 estimated tax payments and amount applied from 2022 return 26

27 Earned income credit (EIC) 27

28 Additional child tax credit from Schedule 8812 28

29 American opportunity credit from Form 8863, line 8 29

30 Reserved for future use 30

31 Amount from Schedule 3, line 15 31

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

Schedule 1 (Form 1040) 2023 Page 2

Part II Adjustments to Income

11 Educator expenses 11

12 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 12

13 Health savings account deduction. Attach Form 8889 13

14 Moving expenses for members of the Armed Forces. Attach Form 3903 14

15 Deductible part of self-employment tax. Attach Schedule SE 15

16 Self-employed SEP, SIMPLE, and qualified plans 16

17 Self-employed health insurance deduction 17

18 Penalty on early withdrawal of savings 18

19a Alimony paid 19a

b Recipient's SSN

19c Date of original divorce or separation agreement (see instructions):

20 IRA deduction 20

21 Student loan interest deduction 21

22 Reserved for future use 22

23 Archer MSA deduction

24 Other adjustments:

a Jury duty pay (see instructions)

b Deductible expenses related to income reported or rental of personal property engaged in for profit

c Nontaxable amount of the value of Olympic and Paralympic prize money reported on line 8m

SCHEDULE 3
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074
2023
Attachment Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR Your social security number

Part I Nonrefundable Credits

1 Foreign tax credit. Attach Form 1116 if required 1

2 Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441 2

3 Education credits from Form 8863, line 19 3

4 Retirement savings contributions credit. Attach Form 8880 4

5a Residential clean energy credit from Form 5695, line 15 5a

b Energy efficient home improvement credit from Form 5695, line 32 5b

6 Other nonrefundable credits:

a General business credit. Attach Form 3800 6a

Form 1040 (2023) Page 2

Tax and Credits

16 Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐ 16

17 Amount from Schedule 2, line 3 17

18 Add lines 16 and 17 18

19 Child tax credit or credit for other dependents from Schedule 8812 19

20 Amount from Schedule 3, line 8 20

21 Add lines 19 and 20 21

22 Subtract line 21 from line 18. If zero or less, enter -0- 22

23 Other taxes, including self-employment tax, from Schedule 2, line 21 23

24 Add lines 22 and 23. This is your total tax 24

Payments

25 Federal income tax withheld from:

a Form(s) W-2 25a

b Form(s) 1099 25b

c Other forms (see instructions) 25c

d Add lines 25a through 25c 25d

26 2023 estimated tax payments and amount applied from 2022 return 26

27 Earned income credit (EIC) 27

28 Additional child tax credit from Schedule 8812 28

29 American opportunity credit from Form 8863, line 8 29

30 Reserved for future use 30

31 Amount from Schedule 3, line 15 31

32 Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits 32

33 Add lines 25d, 26, and 32. These are your total payments 33

34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid 34

35a Amount of line 34 you want refunded to you. If Form 8888 is attached, check here 35a

Direct deposit? b Routing number c Type: ☐ Checking ☐ Savings

SCHEDULE C
(Form 1040)

Profit or Loss From Business
(Sole Proprietorship)

OMB No. 1545-0074
2023

Department of the Treasury
Internal Revenue Service

Attach to Form 1040, 1040-SR, 1040-SS, 1040-NR, or 1041; partnerships must generally file Form 1065.
Go to www.irs.gov/ScheduleC for instructions and the latest information.

Attachment
Sequence No. **09**

Name of proprietor

Social security number (SSN)

A Principal business or profession, including product or service (see instructions)

B Enter code from instructions

C Business name. If no separate business name, leave blank.

D Employer ID number (EIN) (see instr.)

E Business address (including suite or room no.)
City, town or post office, state, and ZIP code

F Accounting method: (1) ☐ Cash (2) ☐ Accrual (3) ☐ Other (specify)

G Did you "materially participate" in the operation of this business during 2023? If "No," see instructions for limit on losses ☐ Yes ☐ No

H If you started or acquired this business during 2023, check here ☐ Yes ☐ No

I Did you make any payments in 2023 that would require you to file Form(s) 1099? See instructions ☐ Yes ☐ No

J If "Yes," did you or will you file required Form(s) 1099? ☐ Yes ☐ No

Part I Income

1 Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked <input type="checkbox"/>	1
2 Returns and allowances	2
3 Subtract line 2 from line 1	3
4 Cost of goods sold (from line 42)	4
5 Gross profit. Subtract line 4 from line 3	5
6 Other income, including federal and state gasoline or fuel tax credit or refund (see instructions)	6
7 Gross income. Add lines 5 and 6	7

Part II Expenses. Enter expenses for business use of your home **only** on line 30.

8 Advertising	8	18 Office expense (see instructions)	18
9 Car and truck expenses (see instructions)	9	19 Pension and profit-sharing plans	19
10 Commissions and fees	10	20 Rent or lease (see instructions):	
11 Contract labor (see instructions)	11	a Vehicles, machinery, and equipment	20a
12 Depletion	12	b Other business property	20b
13 Depreciation and section 179 expense deduction (not included in Part III) (see instructions)	13	21 Repairs and maintenance	21
14 Employee benefit programs (other than on line 19)	14	22 Supplies (not included in Part III)	22
15 Insurance (other than health)	15	23 Taxes and licenses	23
16 Interest (see instructions):		24 Travel and meals:	
a Mortgage (paid to banks, etc.)	16a	a Travel	24a
b Other	16b	b Deductible meals (see instructions)	24b
17 Legal and professional services	17	25 Utilities	25
18 Total expenses before expenses for business use of home. Add lines 8 through 27b	18	26 Wages (less employment credits)	26
19 Tentative profit or (loss). Subtract line 28 from line 7	19	27a Other expenses (from line 48)	27a
20 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions.		b Energy efficient commercial bldgs deduction (attach Form 7205)	27b
21 Simplified method filers only: Enter the total square footage of (a) your home:		28 Total expenses for business use of home. Add lines 18 and 27b	28
and (b) the part of your home used for business:		29 Net profit or (loss). Subtract line 28 from line 19	29
Method Worksheet in the instructions to figure the amount to enter on line 30			
30 Net profit or (loss). Subtract line 30 from line 29	30		

31 Net profit or (loss). Subtract line 30 from line 29

• If a profit, enter on both Schedule 1 (Form 1040), line 3, and on Schedule SE, line 2. (If you checked the box on line 1, see instructions.) Estates and trusts, enter on Form 1041, line 3.

• If a loss, you must go to line 32.

32 If you have a loss, check the box that describes your investment in this activity. See instructions.

• If you checked 32a, enter SE, line 2. (If you checked Form 1041, line 3.

• If you checked 32b, see For Paperwork Reduction Act

SCHEDULE 1
(Form 1040)

Additional Income and Adjustments to Income

OMB No. 1545-0074

2023

Department of the Treasury
Internal Revenue Service

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

Attachment
Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

Your social security number

Part I Additional Income

1 Taxable refunds, credits, or offsets of state and local income taxes	1
2a Alimony received	2a
b Date of original divorce or separation agreement (see instructions):	
3 Business income or (loss). Attach Schedule C	3
4 Other gains or (losses). Attach Form 4797	4
5 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	5
6 Farm income or (loss). Attach Schedule F	6
7 Unemployment compensation	7
8 Other income:	
a Net operating loss	8a ()
b Gambling	8b
c Cancellation of debt	8c
d Foreign earned income exclusion from Form 2555	8d ()
e Income from Form 8853	8e
f Income from Form 8889	8f
g Alaska Permanent Fund dividends	8g
h Jury duty pay	8h