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## Answers to Your General Filing Questions

### Do I need to file a tax return?

**You are not required to file a tax return for 2022.**

You are not required to file a tax return because your income does not equal or exceed \$2,050, nor do you owe any special taxes or have any special situations that require you to file.

### What is my filing status?

**Your filing status is married filing separately.**

You are not eligible for any other filing status.

The married filing separately status may affect the taxability of Social Security benefits. It may also affect your eligibility to claim certain deductions and credits. Married couples who file separately usually pay more tax than those who file jointly.

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### Your General Information

What tax year are you asking about? 2022

What is your filing status for 2022?

I don't know

What is your date of birth? 9/25/95

Can you be claimed as a dependent on another taxpayer's return (such as a parent's return) for 2022? Yes

Did you live in a community property state in 2022?

No

Were you blind on the last day of 2022? No

Were you permanently and totally disabled at any time during 2022? No

Do you and your spouse intend to file a joint tax return for 2022? No

### Your Spouse's General Information

What is your spouse's date of birth? 3/18/95

Is your spouse itemizing deductions? No

Did your spouse live in your home at any time during the last six months of 2022 (including any temporary absences)?

Yes

### Family Information

What was your marital status on the last day of 2022?

Married

Did you live with your spouse at any time during 2022? Yes

Did you and/or your spouse provide more than half of your support for 2022? No

## Employment Information

What was your employment status in 2022? Neither

## Social Security Information

Did you receive social security benefits in 2022?

No

## Your Income

What was your earned income in 2022?

\$1,650

What was your unearned income in 2022?

\$0

Was your gross income for 2022 \$4,400 or more? No

Did you receive railroad retirement benefits in 2022?

No

## Recapture of Previously Claimed Credits

Have you claimed the first-time homebuyer credit on a prior year return? No

## Additional Taxes

Are you liable for an additional tax on a qualified plan, including an Individual Retirement Arrangement (IRA), or other tax-favored account, in 2022? No

## Do I Need to File a Tax Return?

Do you owe recapture taxes?

No

Did you receive distributions from an Archer Medical Savings Account (MSA), Medicare Advantage MSA, or Health Savings Account (HSA)?

No

Did you have Federal income tax withheld in 2022? No

Are you liable for household employment taxes? No

Did you make estimated tax payments for 2022? No

Did you have any overpayments (refunds) from 2021 applied to 2022's estimated tax? No

For 2022, do you owe any additional (write-in) taxes? No

Did you receive Form 1099-B, Proceeds From Broker and Barter Exchange Transactions? No

Internal Revenue Code (IRC) 965, which was amended by the Tax Cuts and Jobs Act on December 22, 2017, requires some taxpayers to pay a transition tax on the untaxed foreign earnings of certain specified foreign corporations that they directly or indirectly own. IRC 965 applies to the last taxable year of a specified foreign corporation beginning before January 1, 2018, and the amount required to be included in income under IRC 965 is reported on the taxpayer's return for the taxable year in which or with which its specified foreign corporation's taxable year ends. Although the taxpayer generally must pay the transition tax with this return, some taxpayers may make an election under IRC 965(h) to pay the tax in eight annual installments or an election under IRC 965(i) to defer payment of the tax.

Are you required to include an amount in income under section 965 or do you have a net tax liability under IRC 965 that you are paying in installments under IRC 965(h) or that you deferred by making an election under IRC 965(i)?

No

Are you liable for Alternative Minimum Tax? No

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**Disclaimer**

The conclusions above are based on information provided by you in response to the questions you answered. This does not constitute written advice in response to a specific written request of the taxpayer within the meaning of section 6404(f) of the Internal Revenue Code.

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