

# TY 2022 Tax Summary

| [Name]                | Filing Status | Foreign      | Domestic      |
|-----------------------|---------------|--------------|---------------|
| Gross Income          |               | \$ 23,242.00 | \$ 126,732.00 |
| Adjusted Gross Income |               |              | \$ 119,765.00 |
| Taxable Income        |               |              | \$ 93,222.00  |
| Total Tax             |               | \$ 5,768.00  | \$ 27,324.00  |
| Marginal Tax Rate     |               |              | 22.0%         |
| Average Tax Rate      |               | 24.8%        | 21.5%         |
|                       |               | \$ -         | \$ -          |
|                       |               | \$ -         | \$ -          |



| Credits                                | Qualified? | Taken? | Amount |
|--|------------|--------|--------|
| Earned Income Credit                   | N          | N      |        |
| Retirement Savings Contribution Credit | N          | N      |        |
| Residential Energy Credit              | Y          | N      |        |
| Lifetime Learning Credit               | Y          | N      |        |
| American Opportunity Credit            | N          | N      |        |
| Child Tax Credit                       | Y          | Y      |        |
| Qualified Adoption Expenses Credit     | Y          | N      |        |
| Dependent Care Credit                  | Y          | N      |        |

| Deductions                        | Qualified? | Taken? | Amount |
|-----------------------------------|------------|--------|--------|
| Student Loan Interest Deduction   | Y          | Y      |        |
| Coverell ESA deduction            | N          | N      |        |
| 529 deduction                     | Y          | N      |        |
| Traditional 401(k) deduction      | N          | N      |        |
| Traditional IRA deduction         | N          | N      |        |
| HSA deduction                     | Y          | Y      |        |
| Charitable giving & DAF deduction | Y          | Y      |        |

| Planning Considerations      | Qualified | Taken? | Amount |
|------------------------------|-----------|--------|--------|
| Roth Conversions             | Y         | N      |        |
| Carryforward Losses          | Y         | N      |        |
| Gifts above annual exclusion | Y         | N      |        |

| Notes | . | .. | ... |
|-------|---|----|-----|
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