

# 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 \_\_\_\_\_, 2020. 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  Head of household (HOH)  
 Married filing jointly (even if only one had income)  
Check only one box.  Married filing separately (MFS)  Qualifying surviving spouse (QSS)  
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):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

**Income**

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

Attach Sch. B if required.

2a	2b	3a	3b	4a	4b	5a	5b	6a	6b
Tax-exempt interest	Taxable interest	Qualified dividends	Ordinary dividends	IRA distributions	Taxable amount	Pensions and annuities	Taxable amount	Social security benefits	Taxable amount

**Standard Deduction for:**

- Single or Married filing separately, \$13,850
- Married filing jointly or Qualifying surviving spouse, \$27,700
- Head of household, \$20,800

If you checked any box under Standard Deduction, see instructions.

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

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

Form 1040 (2023) Page 2

<b>Tax and Credits</b>	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	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 <b>total tax</b>	24
<b>Payments</b>	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
8 5	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	
8 c	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	23
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 and USOC prize money reported on line 8m	

**SCHEDULE 3 (Form 1040) Additional Credits and Payments**

Department of the Treasury Internal Revenue Service OMB No. 1545-0074

Attach to Form 1040, 1040-SR, or 1040-NR. Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

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
9 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

<b>Tax and Credits</b>	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	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 <b>total tax</b>	24
<b>Payments</b>	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
	9 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 <b>total other payments and refundable credits</b>	32
	33	Add lines 25d, 26, and 32. These are your <b>total payments</b>	33
<b>Refund</b>	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 Attachment Sequence No. 09

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.

Name of proprietor, Social security number (SSN), Principal business or profession, Business name, Business address, Accounting method, Did you materially participate?, If you started or acquired this business during 2023, check here, Did you make any payments in 2023 that would require you to file Form(s) 1099?, If "Yes," did you or will you file required Form(s) 1099?

Part I Income

Table with 7 rows: 1 Gross receipts or sales, 2 Returns and allowances, 3 Subtract line 2 from line 1, 4 Cost of goods sold (from line 42), 5 Gross profit, 6 Other income, 7 Gross income.

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

Table with 29 rows of expense categories: 8 Advertising, 9 Car and truck expenses, 10 Commissions and fees, 11 Contract labor, 12 Depletion, 13 Depreciation and section 179 expense deduction, 14 Employee benefit programs, 15 Insurance, 16 Interest, 17 Legal and professional services, 18 Office expense, 19 Pension and profit-sharing plans, 20 Rent or lease, 21 Repairs and maintenance, 22 Supplies, 23 Taxes and licenses, 24 Travel and meals, 25 Utilities, 26 Wages, 27a Other expenses, 27b Energy efficient commercial bldgs deduction, 28 Total expenses before expenses for business use of home, 29 Tentative profit or (loss).

30 Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions. Simplified method filers only: Enter the total square footage of (a) your home: and (b) the part of your home used for business: Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 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 Attachment Sequence No. 01

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.

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

Part I Additional Income

Table with 13 rows: 1 Taxable refunds, credits, or offsets of state and local income taxes, 2a Alimony received, 3 Business income or (loss), 4 Other gains or (losses), 5 Rental real estate, royalties, partnerships, S corporations, trusts, etc., 6 Farm income or (loss), 7 Unemployment compensation, 8 Other income: 8a Net operating loss, 8b Gambling, 8c Cancellation of debt, 8d Foreign earned income exclusion from Form 2555, 8e Income from Form 8853, 8f Income from Form 8889, 8g Alaska Permanent Fund dividends, 8h Jury duty pay.