

# NEWLYWED TAX STARTER KIT

A quick guide to help you and your spouse start off on the right foot when filing taxes together.

## Are You Eligible to File Jointly?



- Married as of Dec. 31 = eligible for “Married Filing Jointly”
- Both spouses must agree and sign the return
- Benefits: higher standard deduction, more tax credits

## Choose Your Filing Status Wisely

- Married Filing Jointly → usually lowest overall tax
- Married Filing Separately → makes sense if:
  - One spouse has significant medical expenses
  - You want to keep finances separate
- Compare both before filing



## What You Need Before You File



- ✓ Updated personal info (name, SSN, address)
- ✓ W-2s, 1099s, other income docs
- ✓ Bank info for direct deposit
- ✓ Records of deductions & credits (childcare, education, mortgage, etc.)

## Avoid These Filing Mistakes

- ✗ Forgetting to update your name or address with SSA/IRS
- ✗ Overlooking tax benefits (EITC, Child Tax Credit, Saver’s Credit)
- ✗ Mismatched income documents (W-2s, 1099s)
- ✗ Missing signatures on joint return

