

Volunteer Income Tax Assistance 2023 Total Gross Income Worksheet

Married Couples Use Separate Forms

Please note that due to the complexity of the tax laws and the IRS limitations on VITA, we may **not** assist with the preparation of returns with any of the following:

- Rental Income or Loss
- Foreign Earned Income (work outside the United States)
- Start-Up Business Ventures or Losses (Self-Produced projects for film, music, theatre, or Indiegogo, Fractured Atlas, GoFundMe, Kickstarter, Seed & Spark, and other crowd-funded sources)
- K-1 Income or Losses (reported from S Corporations, Partnerships (general or limited), Estates and Trusts)
- Sales of Real Property (rental homes, personal residences, time-shares, etc.)
- Sales of Assets without Cost Basis
- Farm Income

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|--|----------|
| 1. Total Box 1 of ALL W-2 Forms | \$ _____ |
| 2. Total Box 1 of all 1099-INTEREST (or year-end totals) | \$ _____ |
| 3. Total Box 1a of all 1099-DIVIDENDS (or year-end totals) | \$ _____ |
| 4. Total Box 1 of all 1099-R Pension/Retirement | \$ _____ |
| 5. Total Box 5 of 1099-SSA Social Security | \$ _____ |
| 6a. Total Boxes 2 or 3 of all 1099-MISC Performing Arts Fees/Royalties Income <i>(even if you did not receive a 1099)</i> | \$ _____ |
| 6b. Total Box 1 of all 1099-NEC Performing Arts Fee Income <i>(even if you did not receive a 1099)</i> | \$ _____ |
| 6c. Total Non-Performing Arts Fee Income <i>(even if you did not receive a 1099)</i> What was the business? _____ | \$ _____ |
| 7. Total Box 1 of 1099-G – Unemployment | \$ _____ |
| 8. Total of 1099-B Sales of Investments – Must have entire 1099 Brokerage Statement to determine cost basis (Sales of Stocks, Bonds, Mutual Funds, etc. - your brokerage statement has the information) | \$ _____ |
| 9. Total Alimony Received | \$ _____ |
| 10. Total State Refunds received in 2023 from any year(s) | \$ _____ |
| 11. Total Jury Duty, Election Pay, Gambling Winnings, Prizes, Other | \$ _____ |

TOTAL OF THE ABOVE INCOME ITEMS \$ _____

If the above total exceeds \$100,000 for Single filers or \$200,000 for Married filers, VITA may **not** prepare your tax returns this year.