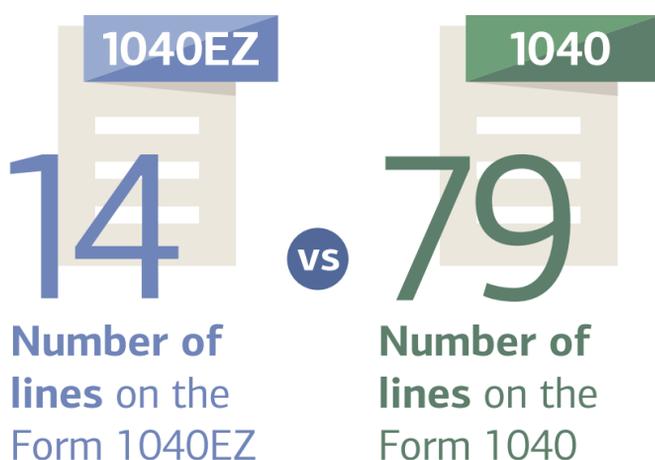


# Is the Form 1040EZ right for me?

The Form 1040EZ is the simplest of the three IRS forms for individual income tax returns, but not everyone qualifies to use it. Here's what you need to know.

## About the Form 1040EZ

It's the shortest of the three IRS 1040 forms (1040, 1040A, 1040EZ), making it especially helpful for first-time filers. When you use it, you qualify for free filing through the IRS.



## Who qualifies...

You likely **CAN** use it if...

You **CANNOT** use it if...



you earn less than **\$100,000** in taxable income



you have more than **\$1,500** in earnings from interest

- You aren't claiming any **credits** (other than the Earned Income Credit)

- You plan to claim **income adjustments from student loan payments or retirement plan contributions**

You're **under 65 and single or your filing status is married filing jointly**

You plan to claim **itemized deductions, like the mortgage interest deduction, instead of the standard deduction**

## Do I qualify?

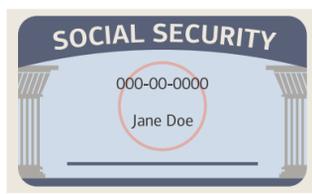
This isn't a complete list and there may be exceptions. For a full checklist of who qualifies to use the Form 1040EZ, check the IRS website.



## Understanding the Form 1040EZ

The form is broken into 4 main sections. Knowing what they are can help you gather information before you get started.

### Personal information:



- Name
- Address
- Social Security number
- Filing status

1

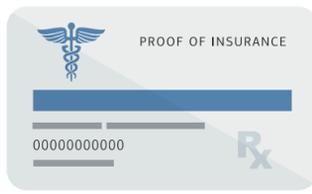
### Income:

Wages, salaries and tips; taxable interest, unemployment compensation



2

### Payments, taxes and EIC:

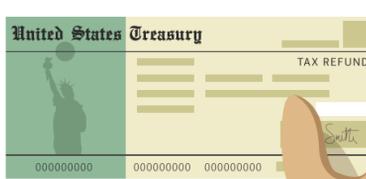


Federal taxes withheld, Earned Income Credit, health care coverage

3

### Refund or amount owed:

You will arrive at this number by completing the rest of the form



4

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