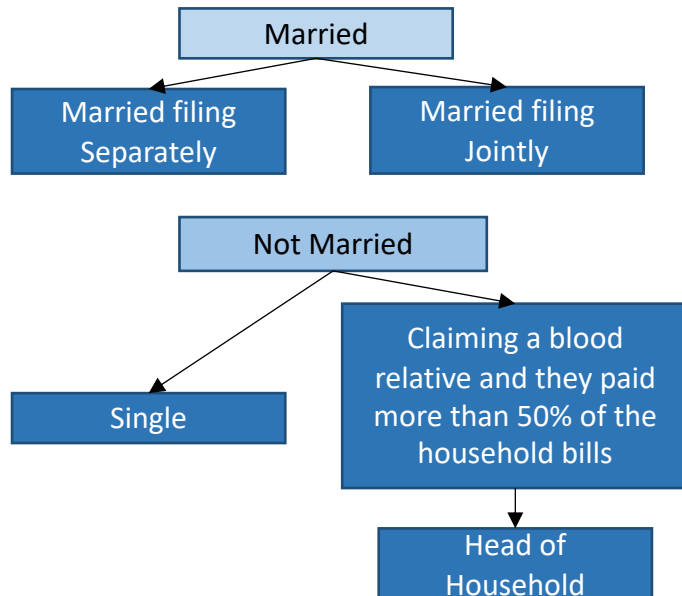


2023 TAX REFERENCE GUIDE

2023 Standard Deductions

Filing Status	Base Amount
Single	\$13,850
Married Filing Joint	\$27,700
Married Filing Separate	\$13,850
Head of Household	\$20,800
Qualifying Surviving Spouse	\$27,700

Filing Status (Two Options)



Who can be claimed as a dependent?

ANYONE that lived with the taxpayer and was supported over 50% by the taxpayer can be claimed as a dependent.

- Age does NOT matter
- Relationship does NOT matter

Earned Income Tax Credit & Child Tax Credit Eligible Dependent relationships

Son Daughter Grandchild Brother Sister Niece Nephew

To qualify for Earned Income Tax Credit (EIC/EITC)

- Live in the US
- Dependent must be 18 or under on 12/31/2023
- OR 19-23 and a full-time student

Number of Dependents	Max EIC	Max AGI (Single/HOH)	Max AGI (MFJ)
None	\$600	\$17,640	\$24,210
One	\$3,995	\$46,560	\$53,120
Two	\$6,604	\$52,918	\$59,478
Three	\$6,935	\$56,838	\$63,398

To qualify for Child Tax Credit (CTC)

- Dependent must be 16 or under on 12/31/2023
- Maximum of \$2000 per dependent
- Taxpayer must have at least \$2500 of earned income

Contact Live Chat for any and all questions.

SOFTWARE & BANK PRODUCT GUIDE

Refund Options & Bank Products

“EPS Advance”

They would like to apply for an advance to get a portion of their refund before the IRS releases it. Their fees will be taken out of their refund.

“EPS”

They do NOT want an advance. They will wait for the IRS to release their refund and want their fees taken out of the refund.

“E-file” or “Paper File”

They want to pay their prep fees upfront/today.

What is the Advance?

There are 2 advance products:

- Up to \$1000 with no interest
- Up to \$6000 with interest charge

Important Info:

- No credit check
- Must have W-2
- Interest capped at 60 days
- Only charged for what they are approved for (applying is free)
- Approval is not guaranteed

Interest on Advance

How long it takes the IRS to fund:

Refund is deposited in 14 days

Refund is deposited in 21 days

Refund is deposited in 28 days

Maximum charge (60 days)

Cost Per \$1,000 Borrowed:

\$13.81

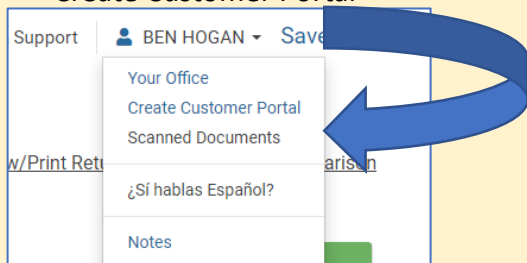
\$20.71

\$27.62

\$59.18

Send the portal link to customer for signatures or to collect or send documents

1. Enter the return you want to create the portal for.
2. In the top right corner under the name click “Create Customer Portal”



3. Enter the taxpayer’s email or cell phone number to send them their link.
4. You can access or upload documents here.

Status Key

- REVIEW – The return has been sent to ATS for review
- PENDING – The return has been sent to the IRS and is awaiting acknowledgment
- REJECTED – The IRS has rejected the return. Please make corrections and resubmit
- ACCEPTED – The IRS has accepted the return

Contact Live Chat for any and all questions.