



TAX TIPS FOR NEWLYWEDS FACT SHEET



Congratulations on your marriage AND getting that “Married, Filing Jointly” tax break! Review this important information to make sure everything goes smoothly.

1. It's important that the names and Social Security numbers that you put on your tax return match your Social Security Administration (SSA) records. If you've changed your name, report the change to the SSA. To do that, file Form SS-5, Application for a Social Security Card. You can get this form on their website at SSA.gov, by calling 800-7721213 or by visiting your local SSA office.
2. If your address has changed, file Form 8822, Change of Address to notify the IRS. You should also notify the U.S. Postal Service if your address has changed. You can ask to have your mail forwarded online at USPS.com or report the change at your local post office.
3. If you work, report your name or address change to your employer. This will help to ensure that you receive your Form W-2, Wage and Tax Statement, after the end of the year.
4. If you and your spouse both work, you should check the amount of federal income tax withheld from your pay. Your combined incomes may move you into a higher tax bracket. Use the IRS Withholding Calculator tool at IRS.gov to help you complete a new Form W-4, Employee's Withholding Allowance Certificate. See Publication 505, Tax Withholding and Estimated Tax, for more information.
5. If you didn't qualify to itemize deductions before you were married, that may have changed. You and your spouse may save money by itemizing rather than taking the standard deduction on your tax return. You'll need to use Form 1040 with Schedule A, Itemized Deductions. You can't use Form 1040A or 1040Z when you itemize.
6. If you are married as of December 31, that's your marital status for the entire year for tax purposes. You and your spouse usually may choose to file your federal income tax return either jointly or separately in any given year. You may want to figure the tax both ways to determine which filing status results in the lowest tax. In most cases, it's beneficial to file jointly.



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