



2023 Tax Forms and Resources

An electronic version of this document with active hyperlinks is available from the Library website at www.auburnlibrary.org

Please Note: Activated links may not return you to this document. It is encouraged that you save this document to your device for easy return to the links.

Many tax forms are available in print at the Library. We are happy to print others for you if you know which ones you need.

Library staff cannot provide advice on taxes, how to complete forms, referrals to tax specialists, or review any of your documents.

Printing or copying tax forms or other tax-related documents from the public copier is available free of charge at the library.

The Auburn Public Library anticipates receiving a limited supply of tax booklets. Please request one at the circulation desk. Limit one per patron / family please.

Taxpayers in Massachusetts will have until Wednesday April 17, 2024 to file both their federal and state 2023 income tax returns

Links Below are for Commonly Used Federal and State Tax Forms for Tax Year 2023

Additional forms are available at <https://www.irs.gov/Forms-&-Pubs>

| | |
|---|--|
| Form 1040 US Individual Income Tax Return | Annual income tax return filed by citizens or residents of the United States. Related: Instructions for Form 1040 Instructions for 1040 Tax Table |
| Form W-9 Request for Taxpayer Identification Number (TIN) and Certification | Used to request a taxpayer identification number (TIN) for reporting on an information return the amount paid. Related: Instructions for Form W-9 |
| Form W-4 Employee's Withholding Allowance Certificate | Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Related: FAQs on the 2020 W4 form Related: Withholding Calculator |
| Form 9465 Installment Agreement Request | Use this form to request a monthly installment plan if you cannot pay the full amount you owe shown on your tax return (or on a notice we sent you). Related: Instructions for Form 9465 |
| Form 8962 Premium Tax Credit (PTC) | Use Form 8962 to figure the amount of your premium tax credit (PTC) and reconcile it with any advance payments of premium tax credit (APTC). Related: Instructions for Form 8962 |

[Form 4506-T](#)

Request for Transcript of Tax Return

Use this form to order a transcript or other return information free of charge, or designate a third party to receive the information.

Related: [Form 2848](#)

Form 1040-EZ and 1040A

Income Tax Return for Single and Joint Filers With No Dependents

These forms have been deactivated by the IRS and are no longer used.

Income tax return filed by certain citizens or residents of the United States.

Related: [Instructions for Form 1040-EZ](#)

[Form 1040-ES](#)

Estimated Tax for Individuals

Figure and pay your estimated tax on income that is not subject to withholding.

[Schedule A \(Form 1040\)](#)

Itemized Deductions

Use this schedule to figure your itemized deductions.

Related: [Instructions for Schedule A \(Form 1040\)](#)

<https://www.irs.gov/pub/irs-pdf/f1040sb.pdf>

IRS Schedule B- Interest and Ordinary Dividends

<https://www.irs.gov/pub/irs-pdf/f1040sd.pdf>

IRS Schedule D - Capital Gains and Losses

<https://www.irs.gov/pub/irs-pdf/fw4v.pdf>

IRS form W4v - Voluntary Withholding Request

[Publication 501](#)

Your Federal Income Tax

Explains the general rules for filing a federal income tax return for the 2020 tax year.

[Form 1040 SR](#)

U.S. Tax Return for Seniors

U.S. Tax Return for Seniors, is used by citizens or residents of the United States who are 65 or older to file an annual income tax return.

[Schedule 1 \(Form 1040\)](#)

Additional Income and Adjustments to Income

[Form 8888](#)

Allocation of Refund

[Form 1040-V](#)

Payment Voucher

**Links Below are for Commonly Used
Massachusetts State Forms for Tax Year 2023**

Additional forms are available at <http://www.mass.gov/dor/forms/online-forms-index.html>

[Tax Filing Options | Resources for finding Tax Assistance](#)

| | | |
|---|--|---|
| Form 1 | Resident Income Tax Return | Income – Form 1 Returns |
| Form 1 Instructions | | Income – Form 1 Returns |
| Form 1-NR/PY | Nonresident or Part-Year Resident Income Tax Return | Personal Income Form 1-NR/PY Returns |
| Form 1-NR/PY Instructions | | Personal Income Form 1-NR/PY Returns |

Massachusetts and IRS Commonly Used Schedules

Additional forms are available at

<http://www.mass.gov/dor/forms/online-forms-index.html>

<https://www.mass.gov/info-details/massachusetts-personal-income-tax-forms-and-instructions#2023-massachusetts-personal-income-tax-forms-&instructions->

- [Schedule HC](#) Health Care Information
- [Schedule HC Instructions and Worksheets](#)
- [Schedule HC-CS](#) Health Care Information Continuation Sheet
- [Form 1099 HC](#) Individual Mandate Massachusetts Healthcare Coverage
- [Schedule X](#) Other Income
- [Schedule Y](#) Other Deductions
- [Schedule DI](#) Dependent Information
- [Schedule D-IS](#) Installment Sales
- [Schedule B](#) Interest, Dividends and Certain Capital Gains and Losses
- [Schedule D](#) Long-Term Capital Gains and Losses Excluding Collectibles
- [Schedule C](#) Massachusetts Profit or Loss from Business
- [Schedule CB](#) Circuit Breaker Credit
- [Schedule E Reconciliation](#) Total Supplemental Income and (Loss)
- [Schedule E-1](#) Rental Real Estate and Royalty Income and (Loss)
- [Schedule E-2](#) Partnership and S Corporation Income and (Loss)
- [Schedule E-3](#) Estate, Trust, REMIC and Farm Income
- [Form PV](#) Payment Voucher