

Financial Summary Report for Tax Filing

(Sample Document)

A **financial summary report** for tax filing provides a clear overview of income, expenses, and deductions to ensure accurate tax preparation. It consolidates essential financial data, making tax calculations straightforward and compliant. This report is crucial for both individuals and businesses to meet tax obligations efficiently.

Report Information

Name	John Doe
Report Period	Jan 1, 2023 – Dec 31, 2023
Tax Identification Number	123-45-6789
Prepared On	April 15, 2024

Income Summary

Source	Amount (USD)
Salary/Wages	55,000.00
Dividends	2,500.00
Interest	350.00
Other Income	650.00
Total Income	58,500.00

Expense & Deduction Summary

Category	Amount (USD)
Business Expenses	3,750.00
Medical Expenses	2,000.00
Charitable Contributions	1,500.00
Other Deductions	800.00
Total Deductions	8,050.00

Net Taxable Income

Description	Amount (USD)
Total Income	58,500.00
- Total Deductions	-8,050.00
Net Taxable Income	50,450.00

Prepared by: Jane Smith, CPA

This is a sample report provided for informational purposes only. For actual tax filing, please consult a qualified tax professional.

