



IRS Summertime Tax Tip 2016-08: How a Summer Wedding Can Affect Your Taxes

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IRS Tax Tips

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How a Summer Wedding Can Affect Your Taxes

With all the planning and preparation that goes into a wedding, taxes may not be high on your summer wedding checklist. However, you should be aware of the tax issues that come along with marriage. Here are some basic tips to help with your planning:

- **Name change.** The names and Social Security numbers on your tax return must match your Social Security Administration records. If you change your name, report it to the SSA. To do that, file Form SS-5, Application for a Social Security Card. You can get the form on [SSA.gov](#), by calling 800-772-1213 or from your local SSA office.
- **Change tax withholding.** A change in your marital status means you must give your employer a new [Form W-4](#), Employee's Withholding Allowance Certificate. If you and your spouse both work, your combined incomes may move you into a higher tax bracket or you may be affected by the [Additional Medicare Tax](#). Use the [IRS Withholding Calculator](#) tool at IRS.gov to help you complete a new Form W-4. See [Publication 505](#), Tax Withholding and Estimated Tax, for more information.
- **Changes in circumstances.** If you or your spouse purchased a

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Health Insurance Marketplace plan and receive advance payments of the [premium tax credit](#) in 2016, it is important that you [report changes in circumstances](#), such as changes in your income or family size, to your Health Insurance Marketplace when they happen. You should also notify the Marketplace when you move out of the area covered by your current Marketplace plan. Advance credit payments are paid directly to your insurance company on your behalf to lower the out-of-pocket cost you pay for your health insurance premiums. Reporting changes now will help you get the proper type and amount of financial assistance so you can avoid getting too much or too little in advance, which may affect your refund or balance due when you file your tax return.

- **Address change.** Let the IRS know if your address changes. To do that, send the IRS [Form 8822](#), Change of Address. You should also notify the U.S. Postal Service. You can ask them online at [USPS.com](#) to forward your mail. You may also report the change at your local post office. You should also notify your Health Insurance Marketplace when you move out of the area covered by your current health care plan.

- **Tax filing status.** If you're married as of Dec. 31, that's your marital status for the whole year for tax purposes. You and your spouse can choose to file your federal income tax return either jointly or separately each year. You may want to figure the tax both ways to find out which status results in the lowest tax.

- **Select the right tax form.** Choosing the right income tax form can help save money. Newly married taxpayers may find that they now have enough deductions to itemize on their tax returns. You must claim itemized deductions on a [Form 1040](#), not a Form 1040A or Form 1040EZ.

[IRS Tax Tips](#) provide valuable information throughout the year. IRS.gov offers tax help and info on various topics including common [tax scams](#), [taxpayer rights](#) and more.

IRS YouTube Videos:

- [Getting Married? – English](#)
- [Changed Your Name After Marriage or Divorce? – Spanish | ASL](#)
- [IRS Withholding Calculator – English | Spanish | ASL](#)
- [Premium Tax Credit: Changes in Circumstances-Introduction – English | ASL](#)

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