

## Sample article for organizations to use to reach customers (496 word count)

*Customize and post the following article on your websites and/or use in other communication vehicles, to inform your customers about simple steps to take regarding taxes after marriage.*

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### Getting married this summer? Wedding season is in full swing!

Congratulations! You have tied the knot and cut the cake. Here are some simple steps to make your first, joint-income tax return less stressful.

**Step 1:** Marriage can mean a change in name. Make sure that the names you enter on your first tax return match the names and Social Security numbers on file with the [Social Security Administration](#). For example, if the wife is taking the husband's surname, she should file Form SS-5, Application for a Social Security Card, to notify SSA of the change in her name.

**Step 2:** No matter when you get married this year, even on Dec. 31, 2013, you are considered to have been married for the entire year for tax purposes. If both you and your spouse work, your combined income may place you in a higher tax bracket. To make sure you are having enough taxes taken out of your paychecks, [check your withholding](#).

The [IRS Withholding Calculator](#) will help you figure the correct amount of withholding for a married couple. Making a change to your withholding now can eliminate or reduce a tax bill when it's time to file your tax return. Use Form W-4, Employee's Withholding Allowance Certificate, to make the needed adjustments and give the form to your employer.

**Step 3:** Let the IRS know your new address by completing [IRS Form 8822, Change of Address](#). Mail the completed form to the address listed on Page 2 of this form.

**Step 4:** The U.S. postmaster will also want to make sure the post office has your correct address. So, don't forget to notify [U. S. Postal Service](#) when you move, so it can forward any IRS correspondence or refunds.

**Step 5:** Just in case you forgot to invite your employer to the wedding, make sure you let them know about any name and address changes. This will ensure you receive your Form W-2, Wage and Tax Statement, after the end of the year. Make sure banks or other payers that may send you year-end tax statements have your updated name and address as well.

**Step 6:** Select the right tax form. Choosing the right individual income tax form can help save money. Newly married taxpayers may find that they now have enough deductions to itemize on their tax returns. Itemized deductions must be claimed on a Form 1040, not a 1040A or 1040EZ.

**Step 7:** Choose the best filing status. A person's marital status on Dec. 31 determines whether the person is considered married for that year. Generally, the tax law allows married couples to choose to file their federal income tax return either jointly or separately in any given year. Figuring the tax both ways can determine which filing status will result in the lowest tax, but usually, filing jointly is more beneficial.

When it comes to wedding planning, details are important. Why not take these steps now to be sure your first tax season as a married couple goes smoothly as well?

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**NOTE TO EDITOR:** Below are additional resources, including YouTube videos, you can share with your customers regarding taxes after marriage.

YouTube –

[Changed Your Name After Marriage or Divorce?](#)

[Getting Married?](#)

**Sample Tweets –**

IRSTaxTip - #IRS tips for recently married or divorced taxpayers who have changed names.

<http://go.usa.gov/rwdF> #tax #refund

Marriage, children, or other life-changing event? It may be a good idea to adjust your #IRS #tax withholding <http://go.usa.gov/rvfk>