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Tax Checklist for Newlyweds

Taxpayer's marital status as of December 31 determines their tax filing options for the entire year, but that's not all newlyweds need to know.

Report a name change

Report any name changes to the Social Security Administration. The name on a person's tax return must match what's on file at the SSA. Otherwise, it could delay any tax refund. Taxpayers should file [Form SS-5, Application for a Social Security Card](#) with their updated information. It's available on SSA.gov, by phone at 800-772-1213 or at a local SSA office.

Update address

Notify their local post office, employers and the IRS of any address change. To officially change their mailing address with the IRS, taxpayers must complete and submit [Form 8822, Change of Address](#). See page 2 of the form for detailed instructions.

Check withholding

Newly married couples must give their employers a new [Form W-4, Employee's Withholding Certificate](#), within 10 days. If both people work, this could move them into a higher tax bracket or be affected by the [additional Medicare tax](#). The [Tax Withholding Estimator](#) on IRS.gov can be used to check withholding and provide tips for completing a new Form W-4.

Review filing status

Married people can choose to file their federal income taxes jointly or separately. While filing jointly is usually more beneficial, it's best to figure the tax both ways to find out which makes the most sense.