



2024 quick reference tax planning guide

Retirement plans

)PIGXMZI HIJIVVEPW O F
 ERH 7%67)4W
 tt'EXGL YT GSRXVMFYXMSR
 (IJMRIH GSRXVMFYXMSR i G %
 (IJMRIH FIRIJMX i F %
 7-140) TPER
 tt7-140) GEXGL YT GSRXVMFYXMSR
 1E\MQYQ MRGPYHMFPI GSQTIRWEXMSR
 ,MKLP] GSQTIRWEXIH IQTPS]II
 tt0SSO FEGO XS
 tt0SSO FEGO XS
 /I] IQTPS]II XST LIEZ] TPER
 7)4 TEVXMGMTTEXMSR PMQMX
 -6% SV 6SXL -6% GSRXVMFYXMSR P
 tt-6% SV 6SXL -6% GEXGL YT
 -6% HIHYGXMSR TLEWISYX JSV EGXMZ
 tt7MRKPI
 tt1EVMVIH JMPMRK NSMRXP]
 tt1EVMVIH JMPMRK WITEVEXIP]
 tt7TSYWEP -6%
 6SXL -6% TLEWISYX
 tt7MRKPI
 tt1EVMVIH JMPMRK NSMRXP]

Estate and gift tax

%RRYEP KMJX XE\ I\GPYWMSR
)WXEXI XE\ FEWMG I\GPYWMSR
 2SR GMXM^IR WTSYWI ERRYEP KMJX XE\ I\GPYWMSR
 +MJX XEGP^EWMSR\
 +IRIVEXMSR WOMTTMRK I\IQTXMSR
 1E\MQYQ IWXEXI XE\ VEXI

Standard mileage rates

&YWMRIWW YWI d TIV QMPI
 'LEVMXEFPI YWI RSX MRH^I^IIV QMPI
 1IHMGEF SV QSZMRK YWI d TIV QMPI

Medicare

1SRXLP] TVIQMYO
 tt4EVX %
 tt4EVX] ^KYVI
 4EVX %
 tt*MVWX HE]W,TEXMIRX TE"VuI@I4EVX %

Social Security

77 [EKI FEWI
 *-'% XE\ VEX1,IQTPS]II
 7)'% XE\ VEXI,WIPJ IQTPS]IH
)EVRMRKW PMQMXEXMSR
 &IPS[*6% JSV
 tt4IVWSRW VIEGLMRK *6% JSV
 t %TTPMIW SRP] XS IEVRMRKW JSV QSRXLW TVMSV XS EXXEMMRK *6%
 7SGMEP 7IGYVMX] GSWX SJ PMZMRK EHNYWXQIRX
 5YEYXIV SJ GSZIVEKI
 1E\MQYQ FIRIJMX [SV^P^V^FXMVMRK-EX *6%
)WXMQEXIH EZIVEKI QSRXLP] FIRIJMX

Social Security FRA

=IEV \$\$\$GMEP 7IGYVMX] 7IGYVMX]
 FMVXL 6% FMVXL *6%
 66 ERH QSRXLW ERH QSRXLW
 ERH QSRXLW ERH QSRXLW
 ERH QSRXLW PEXIV
 ERH QSRXLW

