



Alabama Individual Income Tax Return RESIDENTS & PART-YEAR RESIDENTS

For the year Jan. 1 - Dec. 31, 2012, or other tax year: Beginning: Ending:

Personal information section including name, address, and filing status options.

Section for social security numbers and spouse's social security number.

CHECK BOX IF AMENDED RETURN

Filing Status/ Exemptions

- 1 Single, 2 Married filing joint, 3 Married filing separate, 4 Head of Family

Income and Adjustments

Table for income and adjustments with columns for wages, interest, and total income.

Deductions

You Must Attach page 2 of Federal Form 1040, Federal Form 1040A, Federal Form 1040NR, or page 1 of 1040EZ, if claiming a deduction on line 12.

Table for deductions including itemized and standard deduction options.

Tax

Staple Form(s) W-2, W-2G, and/or 1099 here.

Table for tax calculations including net tax due and Alabama election campaign fund.

Payments

Table for tax payments including Alabama income tax withheld and estimated payments.

AMOUNT YOU OWE

Table for amount you owe including estimated tax penalty.

OVERPAID

Table for overpaid amount including amount applied to 2013 estimated tax.

Donations

Table for donations including total donation check-offs.

REFUND

Table for refund including amount refunded to you.

## State Income Tax Return Forms

You can prepare and efile this tax form on efile.com as part of your current Federal and/or State Tax Return on from:

**Early January until mid October**

[You can start, prepare, and efile your tax return now](#)

You will just need to answer a few tax questions and the efile.com tax preparation software will select the correct tax forms for you.



### Attention

**If you missed the mid October efile deadline for the current tax year you have the following options to prepare and file your tax return:**

**1. You can download the State Tax form here:**

<http://www.efile.com/support-state-tax-agency-list/>

**2. Work online on your tax return with an efile Tax Professional**

[Start working with a LIVE TaxPRO](#)

**3. Download Federal tax forms by tax year, complete and mail to the IRS**

[Download Federal Tax Forms](#)

### Free Tax Tools, Calculators and Educators

Head of Household Educator:

<http://www.efile.com/claim-head-of-household-single-qualifying-person-requirement-tax-tool/>

Qualifying Child Dependent Educator:

<http://www.efile.com/qualifying-child-test-qualified-dependent-tax-tool/>

Qualifying Relative Educator:

<http://www.efile.com/qualifying-relative-test-dependent-requirement-tax-tool/>

Earned Income Tax Credit Educator:

<http://www.efile.com/what-is-the-earned-income-tax-credit-eitc-eic-eligibility-schedule-calculator/>

Child Tax Credit Educator:

<http://www.efile.com/how-to-qualify-for-child-tax-credit-deduction-requirements-tool/>

**Got Tax Questions? [Contact efile.com!](#)**



**PART I**

|    |   |    |   |    |
|----|---|----|---|----|
| 1  | Alimony received  | 1  | ● | 00 |
| 2  | Business income or (loss) (attach Federal Schedule C or C-EZ) (see instructions)        | 2  | ● | 00 |
| 3  | Gain or (loss) from sale of Real Estate, Stocks, Bonds, etc. (attach Schedule D)        | 3  | ● | 00 |
| 4a | Total IRA distributions   | 4a | ● | 00 |
| 4b | Taxable amount (see instructions)   | 4b | ● | 00 |
| 5a | Total pensions and annuities  | 5a | ● | 00 |
| 5b | Taxable amount (see instructions)   | 5b | ● | 00 |
| 6  | Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)               | 6  | ● | 00 |
| 7  | Farm income or (loss) (attach Federal Schedule F)                                       | 7  | ● | 00 |
| 8  | Other income (state nature and source — see instructions)                               | 8  | ● | 00 |
| 9  | <b>Total other income.</b> Add lines 1 through 8. Enter here and also on page 1, line 7 | 9  | ● | 00 |

**PART II**

|    |   |    |   |    |
|----|---|----|---|----|
| 1a | Your IRA deduction  | 1a | ● | 00 |
| b  | Spouse's IRA deduction  | 1b | ● | 00 |
| 2  | Payments to a Keogh retirement plan and self-employment SEP deduction                   | 2  | ● | 00 |
| 3  | Penalty on early withdrawal of savings  | 3  | ● | 00 |
| 4  | Alimony paid. Recipient's last name _____ Social security no. ● _____                   | 4  | ● | 00 |
| 5  | Adoption expenses   | 5  | ● | 00 |
| 6  | Moving Expenses (Attach Federal Form 3903) to City _____ State _____ ZIP _____          | 6  | ● | 00 |
| 7  | Self-employed health insurance deduction  | 7  | ● | 00 |
| 8  | Payments to Alabama PACT Program or Alabama College Education Savings Program           | 8  | ● | 00 |
| 9  | Health insurance deduction for small employer employee (see instructions)               | 9  | ● | 00 |
| 10 | Costs to retrofit or upgrade home to resist wind or flood damage                        | 10 | ● | 00 |
| 11 | Deposits to a catastrophe savings account   | 11 | ● | 00 |
| 12 | <b>Total adjustments.</b> Add lines 1 through 11. Enter here and also on page 1, line 9 | 12 | ● | 00 |

**PART III**

**Dependents**

| 1a Dependents: | (1) First name | Last name | (2) Dependent's social security number. | (3) Dependent's relationship to you. | (4) Did you provide more than one-half dependent's support? |
|----------------|----------------|-----------|---|--------------------------------------|---|
| ●              |                |           |   |                                      |   |
| ●              |                |           |   |                                      |   |
| ●              |                |           |   |                                      |   |
| ●              |                |           |   |                                      |   |

Do not include yourself or your spouse

b Total number of dependents claimed above \_\_\_\_\_ ●   

2 **Amount allowed.** (Multiply the total number of dependents claimed on line 1b by the amount from the dependent chart on page 10.)  
Enter amount here and on page 1, line 14

|   |   |    |
|---|---|----|
| 2 | ● | 00 |
|---|---|----|

**PART IV**

**General Information**

1 **Residency** Check only one box  Full Year  Part Year From \_\_\_\_\_ 2012 through \_\_\_\_\_ 2012.

2 Did you file an Alabama income tax return for the year 2011?  Yes  No If no, state reason \_\_\_\_\_

3 Give name and address of present employer(s). Yours \_\_\_\_\_  
Your Spouse's \_\_\_\_\_

4 Enter the Federal Adjusted Gross Income ● \$ \_\_\_\_\_ and Federal Taxable Income ● \$ \_\_\_\_\_ as reported on your 2012 Federal Individual Income Tax Return.

**All Taxpayers Must Complete This Section.**

5 Do you have income which is reported on your Federal return, but not reported on your Alabama return (other than your state tax refund)?  Yes  No  
If yes, enter source(s) and amount(s) below: (other than state income tax refund)

|        |        |   |    |
|--------|--------|---|----|
| Source | Amount | ● | 00 |
| Source | Amount | ● | 00 |

**Sign Here In Black Ink**

Keep a copy of this return for your records.

I authorize a representative of the Department of Revenue to discuss my return and attachments with my preparer.

**Under penalties of perjury,** I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

|  |      |                              |                     |
|--|------|------------------------------|---------------------|
| Your signature                                       | Date | Daytime telephone number ( ) | Your occupation     |
| Spouse's signature (if joint return, BOTH must sign) | Date | Daytime telephone number ( ) | Spouse's occupation |

**Paid Preparer's Use Only**

|   |                           |   |                          |
|---|---------------------------|---|--------------------------|
| Preparer's signature                                | Date                      | Check if self-employed <input type="checkbox"/> | Preparer's SSN or PTIN ● |
| Firm's name (or yours if self-employed) and address | Daytime telephone no. ( ) | E.I. No.  | ZIP Code                 |

If an addressed envelope came with your return, please use it and follow the instructions on the envelope. If you do not have one, mail your return to one of the addresses below.

**WHERE TO FILE FORM 40**

**If you are not making a payment, mail your return to:**  
Alabama Department of Revenue  
P. O. Box 154  
Montgomery, AL 36135-0001

**If you are making a payment, mail your return, Form 40V, and payment to:**  
Alabama Department of Revenue  
P. O. Box 2401  
Montgomery, AL 36140-0001

Mail only your 2012 Form 40 to one of the above addresses. Prior year returns, amended returns, and all other correspondence should be mailed to Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.