

40201

9998



● FOR AMENDED RETURN - ENTER CODE (1 - 5) \_\_\_\_\_  
from page 5

Your Social Security number

Spouse's Social Security number

Your first name		Last name	
Spouse's first name		Last name	
Mailing address			Telephone number
City	State	ZIP + 4	Foreign country (if not U. S.)

**IMPORTANT!**

**Social Security Number(s) Required**

<p>1. Filing status - enter code (page 6)</p> <p>● _____</p> <p>Enter code here</p> <p>If using code 2 or 3, enter spouse's name and social security number above</p> <p><b>CODE</b></p> <p>1 - Single</p> <p>2 - Married filing jointly</p> <p>3 - Married filing separately</p> <p>4 - Head of household</p> <p>5 - Qualifying widow(er)</p>	<p>● 2. Exemptions - enter number (page 6)</p> <p>_____ a - Yourself</p> <p>_____ b - Spouse</p> <p>_____ c - Dependents</p> <p>_____ d - Dependents with a disability (see instr.)</p> <p>_____ e - Total exemptions (add a through d)</p> <p style="text-align: center;">} From federal return</p>	<p>3. Election campaign fund - enter code (page 7)</p> <p style="text-align: center;">Yourself      Spouse</p> <p>● _____      ● _____</p> <p><b>CODE</b></p> <p>A - Americans Elect</p> <p>C - Constitution</p> <p>D - Democratic</p> <p>G - Green</p> <p>J - Justice</p> <p>L - Libertarian</p> <p>R - Republican</p> <p>N - No contribution</p> <p style="font-size: 0.8em;">Does not increase your tax or reduce your refund.</p>
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4. Federal adjusted gross income from federal return (page 7)	● 4	_____ .00
5. Additions to income from TC-40A, Part 1 (attach TC-40A, page 1) (page 7)	● 5	_____ .00
6. Total income (add line 4 and line 5)	6	_____ .00
7. State tax refund included on federal form 1040, line 10, if any (page 7)	● 7	_____ .00
8. Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1) (page 7)	● 8	_____ .00
9. <b>Utah taxable income (loss)</b> (subtract total of lines 7 and 8 from line 6)	● 9	_____ .00
10. <b>Utah tax</b> - multiply line 9 by 5% (.05) (not less than zero)	● 10	_____ .00
11. Exemption amount (multiply \$2,850 by line 2e above) (page 7)	● 11	_____ .00
12. <b>Federal standard or itemized deductions</b> (page 7)	● 12	_____ .00
13. Add line 11 and line 12	13	_____ .00
14. State income tax deducted as an itemized deduction on federal Schedule A, line 5, if any (page 7)	● 14	_____ .00
15. Subtract line 14 from line 13	15	_____ .00
16. Initial credit before phase-out (multiply line 15 by 6% (.06))	● 16	_____ .00
17. Enter: \$13,029 - if single or married filing separately \$19,543 - if head of household \$26,058 - if married filing jointly or qualifying widow(er)	● 17	_____ .00
18. Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	_____ .00
19. Phase-out amount (multiply line 18 by 1.3% (.013))	● 19	_____ .00
20. Taxpayer tax credit (subtract line 19 from line 16) not less than zero	● 20	_____ .00
21. If you are a qualified exempt taxpayer, enter "X" (complete worksheet on page 8)	● 21	_____
22. <b>Utah income tax</b> (subtract line 20 from line 10) not less than zero (page 8)	● 22	_____ .00

Filing electronically is quick, easy and free, and will speed up your refund

To learn more go to **taxexpress.utah.gov**

## 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!](#)**

SSN:

23. Enter tax from TC-40, page 1, line 22	23		.00
24. Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1) (page 8)	● 24		.00
25. Full-year resident (subtract line 24 from line 23) not less than zero (page 8) Non or part-year resident (enter tax from TC-40B, line 37) (page 8)	● 25		.00
26. Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1) (page 8)	● 26		.00
27. Subtract line 26 from line 25 (not less than zero)	27		.00
28. Voluntary contributions from TC-40, page 3 (attach TC-40, page 3)	● 28		.00
29. <b>AMENDED RETURN ONLY</b> - previous refund (page 9)	● 29		.00
30. Recapture of low-income housing credit (page 9)	● 30		.00
31. Utah use tax (page 9)	● 31		.00
32. <b>Total tax, use tax and additions to tax</b> (add lines 27 through 31)	32		.00
33. <b>Utah income tax withheld</b> shown on TC-40W, Part 1 (attach TC-40W, page 1) (page 9)	● 33		.00
34. Credit for Utah income taxes prepaid from TC-546 and 2011 refund applied to 2012 (page 10)	● 34		.00
35. Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2) (page 10)	● 35		.00
36. Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2) (page 10)	● 36		.00
37. <b>AMENDED RETURN ONLY</b> - previous payments (page 10)	● 37		.00
38. Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)(page 10)	● 38		.00
39. <b>Total withholding and refundable credits</b> (add lines 33 through 38)	39		.00
40. <b>Tax due</b> - subtract line 39 from line 32 (not less than zero) (page 10)	<b>TAX DUE</b> ☹️ 40		.00
41. Penalty and interest (page 10)	41		.00
42. <b>TOTAL DUE - PAY THIS AMOUNT</b> (add line 40 and line 41) (page 10)	● 42		.00
43. <b>REFUND</b> - subtract line 32 from line 39 (not less than zero) (page 11)	<b>REFUND</b> 😊 43		.00
44. Enter the amount of refund from line 43 you want applied to your 2013 taxes (page 11)	● 44		.00
45. <b>DIRECT DEPOSIT YOUR REFUND</b> - provide account information (see instr. for foreign accounts) (page 11)			

← Amount to be applied to 2013

● Bank routing number

● Bank account number

Enter "X" for bank account type

● Checking

● Savings

**Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules reflect my true tax status.**

Your signature <b>SIGN HERE</b>	Date	Spouse's signature (if filing jointly, both <u>must</u> sign even if only one had income)	Date
<b>Third Party Designee</b>	Name of designee (if any) you authorize to discuss this return (page 11)		Designee telephone number
			● Designee personal ID number (PIN)
<b>Paid Preparer Section</b>	Preparer signature (page 11)	Date	Preparer telephone number
	Firm name and address		● Preparer PTIN
			● Preparer EIN

**Attach TC-40 page 3 if you are filing for a deceased taxpayer, filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, requesting a direct deposit to be sent to your Utah Educational Savings Plan, requesting a direct deposit to be sent to a foreign account, or are no longer entitled to a homeowner's exemption.**

40203

SSN:

**Part 1 - Deceased Taxpayer Information** (page 6, 11, and 12)

If the taxpayer shown on page 1 died in 2012 or 2013, enter the date of death here

●      /      /       
mm dd yy

If the spouse shown on page 1 died in 2012 or 2013, enter the date of death here

●      /      /       
mm dd yy

If you are claiming a refund due a deceased taxpayer and are not the surviving spouse, you must complete and attach form TC-131 to the return, and enter "X" here

●     

**Part 2 - Fiscal Year Filer** (page 12)

If filing a fiscal year return (a year other than January 1 through December 31, 2012), enter the fiscal year end (mm/yy). See further instructions at [incometax.utah.gov/topics/fiscal-year-filing](http://incometax.utah.gov/topics/fiscal-year-filing).

●      /       
mm yy

**Part 3 - Federal Form 8886 Filed** (page 12)

If you filed federal form 8886, *Reportable Transaction Disclosure Statement*, enter "X". See form and instructions at [irs.gov](http://irs.gov).

●     

**Part 4 - Voluntary Contributions** (write the code and amount of each voluntary contribution)  
 See explanation of each contribution at [incometax.utah.gov/contributions](http://incometax.utah.gov/contributions) (page 12)

The "SCHOOL DIST. CODE" is an additional code used only if contributing to code 05 (page 12)

**Code Description**

- 01 Utah Nongame Wildlife Account
- 02 Pamela Atkinson Homeless Account
- 03 Kurt Oscarson Children's Organ Transplant Account
- 05 School District & Nonprofit School Dist. Foundation (enter school district code)  
 See codes at [incometax.utah.gov/contributions/school-district-contributions](http://incometax.utah.gov/contributions/school-district-contributions)
- 09 Cat & Dog Community Spay and Neuter Program
- 10 Methamphetamine Housing Reconstruction & Rehabilitation Fund
- 11 Canine Body Armor Account

CODE	AMOUNT	SCHOOL DIST. CODE
● <u>    </u>	<u>          </u>	<u>    </u>
● <u>    </u>	<u>          </u>	<u>    </u>
● <u>    </u>	<u>          </u>	<u>    </u>
● <u>    </u>	<u>          </u>	<u>    </u>

**Total voluntary contributions** (add all voluntary contributions and enter the total here and on TC-40, page 2, line 28)

          

**Part 5 - Utah Educational Savings Plan - Refund Application** (page 13)

To deposit your total refund in your Utah Educational Savings Plan (UESP) account(s), enter "X".

●     

Partial refunds are not allowed. UESP will divide your refund equally between all your accounts. If you have no account, UESP will send you an Account Agreement to open an account. If you fail to return the agreement within the time frame UESP designates, your refund will be returned to you by UESP without interest or earnings. See further instructions at [uesp.org](http://uesp.org) or call 801-321-7188 or 1-800-418-2551.

**Part 6 - Direct Deposit to Foreign Account** (page 13)

If you elect to direct deposit your refund to an account outside the United States and its territories, enter "X"

●     

The Tax Commission cannot transfer a refund to an account outside the United States and its territories. By checking this box, your refund will not be direct deposited, but will be sent to you by check.

**Part 7 - Property Owner's Residential Exemption Termination Declaration** (page 13)

If you are a Utah residential property owner and declare you no longer qualify to receive a residential exemption authorized under UC 59-2-103 for your primary residence, check box and enter the county code where residence is located (see instructions for county codes and additional information).

●      Enter "X"  
 ●      Code here

Mail **TAX DUE** returns and **PAYMENTS** to: Utah State Tax Commission  
 210 N 1950 W  
 Salt Lake City, UT 84134-0266

Mail **REFUND** and **NO TAX DUE** returns to: Utah State Tax Commission  
 210 N 1950 W  
 Salt Lake City, UT 84134-0260