

PA-40 2009 (09-09)
Pennsylvania Income Tax Return

PA Department of Revenue, Harrisburg, PA 17129 (FI)

OFFICIAL USE ONLY

PLEASE PRINT IN BLACK INK. ENTER ONE LETTER OR NUMBER IN EACH BOX. FILL IN OVALS COMPLETELY.

Your Social Security Number Spouse's Social Security Number (if filing jointly)

Input boxes for Social Security Numbers

CAREFULLY PRINT YOUR SOCIAL SECURITY NUMBER(S) ABOVE

Last Name Suffix

Last Name and Suffix input boxes

Your First Name MI

Your First Name and MI input boxes

Spouse's First Name MI

Spouse's First Name and MI input boxes

Spouse's Last Name - Only if different from Last Name above Suffix

Spouse's Last Name and Suffix input boxes

First Line of Address

First Line of Address input box

Second Line of Address

Second Line of Address input box

City or Post Office State ZIP Code

City or Post Office, State, and ZIP Code input boxes

Daytime Telephone Number School Code

Daytime Telephone Number and School Code input boxes

Extension. See the instructions.

Amended Return. See the instructions.

Residency Status. Fill in only one oval.

- R Pennsylvania Resident
N Nonresident
P Part-Year Resident from
2009 to 2009

Filing Status. Fill in only one oval.

- S Single
J Married, Filing Jointly
M Married, Filing Separately
F Final Return. Indicate reason:

D Deceased. Date of death 2009

Identification Label Change. Fill in this oval if the label is not completely correct. Discard the incorrect label. Fill in this oval if you did not file a 2008 PA tax return.

Farmers. Fill in this oval if at least two-thirds of your gross income is from farming.

Name of school district where you lived on 12/31/2009:

Your occupation Spouse's occupation

1a. Gross Compensation. Do not include exempt income, such as combat zone pay and qualifying retirement benefits. See the instructions. 1a.

1b. Unreimbursed Employee Business Expenses. 1b.

1c. Net Compensation. Subtract Line 1b from Line 1a. 1c.

2. Interest Income. Complete PA Schedule A if required. 2.

3. Dividend and Capital Gains Distributions Income. Complete PA Schedule B if required. 3.

4. Net Income or Loss from the Operation of a Business, Profession or Farm. LOSS 4.

5. Net Gain or Loss from the Sale, Exchange or Disposition of Property. LOSS 5.

6. Net Income or Loss from Rents, Royalties, Patents or Copyrights. LOSS 6.

7. Estate or Trust Income. Complete and submit PA Schedule J. 7.

8. Gambling and Lottery Winnings. Complete and submit PA Schedule T. 8.

9. Total PA Taxable Income. Add only the positive income amounts from Lines 1c, 2, 3, 4, 5, 6, 7 and 8. DO NOT ADD any losses reported on Lines 4, 5 or 6. 9.

10. Other Deductions. Enter the appropriate code for the type of deduction. See the instructions for additional information. 10.

11. Adjusted PA Taxable Income. Subtract Line 10 from Line 9. 11.

Side 1

EC OFFICIAL USE ONLY FC

Input boxes for EC, OFFICIAL USE ONLY, and FC

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!](#)

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Social Security Number (shown first)

[Empty box for Social Security Number]

Name(s)

12. PA Tax Liability. Multiply Line 11 by 3.07 percent (0.0307). 12.

13. Total PA Tax Withheld. See the instructions. 13.

ESTIMATED TAX PAID

14. Credit from your 2008 PA Income Tax return. 14.

15. 2009 Estimated Installment Payments. 15.

16. 2009 Extension Payment. 16.

17. Nonresident Tax Withheld from your PA Schedule(s) NRK-1. (Nonresidents only) 17.

18. Total Estimated Payments and Credits. Add Lines 14, 15, 16 and 17. 18.

Tax Forgiveness Credit, submit PA Schedule SP

19a. Filing Status: Unmarried or Separated Married Deceased 19b. Dependents, Part B, Line 2, PA Schedule SP.

20. Total Eligibility Income from Part C, Line 11, PA Schedule SP.

21. Tax Forgiveness Credit from Part D, Line 16, PA Schedule SP. 21.

22. Resident Credit. Submit your PA Schedule(s) G-R with your PA Schedule(s) G-S, G-L, and/or RK-1. 22.

23. Total Other Credits. Submit your PA Schedule OC. 23.

24. TOTAL PAYMENTS and CREDITS. Add Lines 13, 18, 21, 22 and 23. 24.

25. TAX DUE. If Line 12 is more than Line 24, enter the difference here. 25.

26. Penalties and Interest. See the instructions for additional information. Fill in oval if including Form REV-1630. 26.

27. TOTAL PAYMENT DUE. See the instructions. 27.

28. OVERPAYMENT. If Line 24 is more than the total of Line 12 and Line 26, enter the difference here. 28. The total of Lines 29 through 35 must equal Line 28.

29. Refund - Amount of Line 28 you want as a check mailed to you. REFUND 29.

30. Credit - Amount of Line 28 you want as a credit to your 2010 estimated account. 30.

DONATIONS

31. Amount of Line 28 you want to donate to the Wild Resource Conservation Fund. . . . 31.

32. Amount of Line 28 you want to donate to the Military Family Relief Assistance Program. 32.

33. Amount of Line 28 you want to donate to the Governor Robert P. Casey Memorial Organ and Tissue Donation Awareness Trust Fund. 33.

34. Amount of Line 28 you want to donate to the Juvenile (Type 1) Diabetes Cure Research Fund 34.

35. Amount of Line 28 you want to donate to the PA Breast Cancer Coalition's Breast and Cervical Cancer Research Fund. 35.

SIGNATURE(S). Under penalties of perjury, I (we) declare that I (we) have examined this return, including all accompanying schedules and statements, and to the best of my (our) belief, they are true, correct, and complete.

Signature and information fields: Your Signature, Date, Preparer's SSN or PTIN, Spouse's Signature, Preparer's Name and Telephone Number, Firm FEIN.

PLEASE DO NOT CALL ABOUT YOUR REFUND UNTIL EIGHT WEEKS AFTER YOU FILE.