

40101

9998



Utah State Tax Commission

# Utah Individual Income Tax Return

**All State Income Tax Dollars Fund Education**  
*incometax.utah.gov*

## 2011

### TC-40

If fiscal year, enter ending date      /      /       
mm / yy

Enter "X" if you filed federal form 8886

**FOR AMENDED RETURN - ENTER CODE (1 - 5) from page 4**

Enter "X" if deceased

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 5)</p> <p><input type="checkbox"/> _____</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 5)</p> <p>a <input type="checkbox"/> Yourself</p> <p>b <input type="checkbox"/> Spouse</p> <p>c <input type="checkbox"/> Dependents</p> <p>d <input type="checkbox"/> <b>Total exemptions</b> (add a through c)</p> <p style="text-align: right;">} From federal return</p>	<p>3. Election campaign fund - enter code (page 5)</p> <p><b>CODE</b></p> <p>C - Constitution</p> <p>D - Democratic</p> <p>L - Libertarian</p> <p>R - Republican</p> <p>N - No contribution</p> <p style="text-align: right;">Yourself    Spouse</p> <p style="text-align: right;"><input type="checkbox"/>            <input type="checkbox"/></p> <p style="text-align: right; font-size: small;">Entering a code does not increase your tax or reduce your refund.</p>
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4. Federal adjusted gross income from federal return (see instructions on page 5)	● 4	_____ .00
5. Additions to income from TC-40A, Part 1 (page 5) (attach TC-40A, page 1)	● 5	_____ .00
6. Total income (add line 4 and line 5)	6	_____ .00
7. State tax refund included on federal form 1040, line 10 (page 6)	● 7	_____ .00
8. Subtractions from income from TC-40A, Part 2 (page 6) (attach TC-40A, page 1)	● 8	_____ .00
9. <b>Utah taxable income (loss)</b> (subtract total of lines 7 and 8 from line 6) (page 6)	● 9	_____ .00
10. <b>Utah tax</b> - multiply line 9 by 5% (.05) If less than zero, enter "0" (page 6)	● 10	_____ .00
11. Exemption calculation - Multiply \$2,775 by line 2d above (page 6)	● 11	_____ .00
12. Enter your <b>federal standard</b> or <b>itemized deductions</b> (page 6)	● 12	_____ .00
13. Add line 11 and line 12	13	_____ .00
14. State income tax deducted as an itemized deduction on federal form 1040, Schedule A, line 5 (page 6)	● 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: \$12,720 - if single or married filing separately \$19,080 - if head of household \$25,440 - if married filing jointly or qualifying widow(er)	● 17	_____ .00
18. Income subject to phase-out - Subtract line 17 from line 9 If less than zero, enter "0" (page 6)	18	_____ .00
19. Phase-out amount - Multiply line 18 by 1.3% (.013) (page 6)	● 19	_____ .00
20. Taxpayer tax credit (subtract line 19 from line 16) If less than zero enter "0"	● 20	_____ .00
21. If you are a qualified exempt taxpayer, enter "X" (complete worksheet on page 7)	● 21	_____
22. <b>Utah income tax</b> (subtract line 20 from line 10) If less than zero enter "0" (page 6)	● 22	_____ .00
23. Apportionable nonrefundable credits from TC-40A, Part 3 - attach TC-40A, page 1 (page 7)	● 23	_____ .00
24. Subtract line 23 from line 22 (Note: if line 23 is greater than or equal to line 22, enter "0")	24	_____ .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!](#)**

- 25. Enter tax (full-year resident, enter tax from line 24 - non/part-year resident, enter tax from TC-40B, line 37) ..... ● 25 \_\_\_\_\_ .00
- 26. Nonapportionable nonrefundable credits from TC-40A, Part 4 - attach TC-40A, page 1) (page 7) ..... ● 26 \_\_\_\_\_ .00
- 27. Subtract line 26 from line 25 (Note: if line 26 is greater than or equal to line 25, enter "0") ..... 27 \_\_\_\_\_ .00

28. **Contributions** (add lines 28a through 28d and enter total contributions on line 28) (page 7)

Enter the codes shown below and the contribution amount.

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
09	Cat & Dog Community Spay and Neuter Program
10	Methamphetamine Housing Recons. & Rehab. Fund
11	Canine Body Armor Account

CODE	AMOUNT	SCHOOL DIST. CODE
● 28a	_____	_____
● 28b	_____	_____
● 28c	_____	_____
● 28d	_____	_____

The "SCHOOL DIST. CODE" is an additional code used only if contributing to code 05 (page 8).

- 29. AMENDED RETURN ONLY - previous refund (page 8) ..... ● 29 \_\_\_\_\_ .00
- 30. Recapture of low-income housing credit (page 8) ..... ● 30 \_\_\_\_\_ .00
- 31. Utah use tax (page 8) ..... ● 31 \_\_\_\_\_ .00
- 32. **Total tax, use tax and additions to tax** (add lines 27 through 31) ..... 32 \_\_\_\_\_ .00
- 33. **UTAH TAX WITHHELD** from TC-40W, Part 1 (attach TC-40W, page 1) (page 8) ..... ● 33 \_\_\_\_\_ .00
- 34. Credit for Utah income taxes prepaid from TC-546 and 2010 refund applied to 2011 (page 8) ..... ● 34 \_\_\_\_\_ .00
- 35. Pass-through entity withholding tax from TC-40W, Part 3 (attach TC-40W, page 2) (page 8) ..... ● 35 \_\_\_\_\_ .00
- 36. Mineral production withholding tax from TC-40W, Part 2 (attach TC-40W, page 2) (page 9) ..... ● 36 \_\_\_\_\_ .00
- 37. AMENDED RETURN ONLY - previous payments (page 9) ..... ● 37 \_\_\_\_\_ .00
- 38. Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)(page 9) ..... ● 38 \_\_\_\_\_ .00
- 39. **Total withholding and refundable credits** (add lines 33 through 38) ..... 39 \_\_\_\_\_ .00
- 40. **Tax due** - If line 32 is greater than line 39, subtract line 39 from line 32 (page 9) ..... **TAX DUE** ☹️ 40 \_\_\_\_\_ .00
- 41. Penalty and interest (page 9) ..... 41 \_\_\_\_\_ .00
- 42. **Pay this amount** (add line 40 and line 41) ..... ● 42 \_\_\_\_\_ .00
- 43. **Refund** - If line 39 is greater than line 32, subtract line 32 from line 39 (page 10) ..... **REFUND** ☺️ 43 \_\_\_\_\_ .00
- 44. Enter refund amount to be applied to your 2012 taxes (page 10) ..... ● 44 \_\_\_\_\_ .00

Amount to be applied to 2012

45. **DIRECT DEPOSIT YOUR REFUND** - provide account information (page 10)

● Bank routing number

● Bank account number

Enter "X" for bank account type

● Checking \_\_\_\_\_ ● Savings \_\_\_\_\_

Check box if refund will go to an account outside of the United States (page 10) ..... ● \_\_\_\_\_

- 46. To deposit total refund to your Utah Educational Savings Plan account(s), enter "X" (see page 10) ..... ● 46 \_\_\_\_\_

**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 SIGN HERE	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 PTIN
	Firm name and address		● Preparer EIN