

# 2011 IA 1040 Iowa Individual Income Tax Form

or fiscal year beginning \_\_\_/\_\_\_/2011 and ending \_\_\_/\_\_\_/\_\_\_

**STEP 1: Fill in all spaces. You MUST fill in your Social Security Number (SSN).**

Your last name \_\_\_\_\_ Your first name/middle initial \_\_\_\_\_

Spouse's last name \_\_\_\_\_ Spouse's first name/middle initial \_\_\_\_\_

Current mailing address (number and street, apartment, lot, or suite number) or PO Box \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Spouse SSN ●	Your SSN ●	<input type="checkbox"/> Check this box if you or your spouse were 65 or older as of 12/31/11.	
<b>STEP 2 Filing Status: Mark one box only.</b>		Residence on 12/31/11	
1	Single: Were you claimed as a dependent on another person's Iowa return? <input type="checkbox"/> YES <input type="checkbox"/> NO ▲	County Number ●	School District Number ●
2	Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)	<b>Dependent children for whom an exemption is claimed in Step 3</b>	
3	Married filing separately on this combined return. Spouse use column B.	How many have health care coverage?(including Medicaid or hawk-i) ●	
4	Married filing separate returns. Spouse's name: _____ SSN: _____	How many do not have health care coverage? ●	
5	Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and SSN below.	Income: \$ _____	
6	Qualifying widow(er) with dependent child. Name: _____ SSN: _____		

**STEP 3 Exemptions**

**a. Personal Credit:** Col. A: Enter 1 (enter 2 if filing status 2 or 5); Col. B: Enter 1 if filing status 3 ▲ \_\_\_\_\_ X \$ 40 = \$ \_\_\_\_\_

**b.** Enter 1 for each person who is **65 or older** and/or 1 for each person who is **blind**.....▲ \_\_\_\_\_ X \$ 20 = \$ \_\_\_\_\_

**c. Dependents:** Enter 1 for each dependent .....▲ \_\_\_\_\_ X \$ 40 = \$ \_\_\_\_\_

**d.** Enter first names of dependents here: \_\_\_\_\_ e. TOTAL \$ \_\_\_\_\_

	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
<b>STEP 4</b>				
1. Wages, salaries, tips, etc. ....	1. _____ .00	_____ .00		
<b>Gross Income</b>				
2. Taxable interest income. If more than \$1,500, complete Sch. B. ....	2. _____ .00	_____ .00		
3. Ordinary dividend income. If more than \$1,500, complete Sch. B. ....	3. _____ .00	_____ .00		
4. Alimony received .....	4. _____ .00	_____ .00		
5. Business income/(loss) from federal Schedule C or C-EZ .....	5. _____ .00	_____ .00		
6. Capital gain/(loss) from federal Sch. D if required for federal purposes .	6. _____ .00	_____ .00		
7. Other gains/(losses) from federal form 4797 .....	7. _____ .00	_____ .00		
8. Taxable IRA distributions .....	8. _____ .00	_____ .00		
9. Taxable pensions and annuities .....	9. _____ .00	_____ .00		
10. Rents, royalties, partnerships, estates, etc. ....	10. _____ .00	_____ .00		
11. Farm income/(loss) from federal Schedule F .....	11. _____ .00	_____ .00		
12. Unemployment compensation. See instructions. ....	12. _____ .00	_____ .00		
13. Taxable Social Security benefits .....	13. _____ .00 ▲	_____ .00		
14. Other income, gambling income, bonus depreciation/section 179 adjustment ...	14. _____ .00	_____ .00		
15. <b>GROSS INCOME.</b> ADD lines 1-14. ....	15. _____ .00 ▲	_____ .00		
<b>STEP 5</b>				
<b>Adjustments to Income</b>				
16. Payments to an IRA, Keogh, or SEP .....	16. _____ .00	_____ .00		
17. Deductible part of self-employment tax .....	17. _____ .00	_____ .00		
18. Health insurance deduction .....	18. _____ .00	_____ .00		
19. Penalty on early withdrawal of savings .....	19. _____ .00	_____ .00		
20. Alimony paid .....	20. _____ .00	_____ .00		
21. Pension/retirement income exclusion .....	21. _____ .00 ▲	_____ .00		
22. Moving expense deduction from federal form 3903 .....	22. _____ .00	_____ .00		
23. Iowa capital gain deduction certain asset sales ONLY (see instructions).	23. _____ .00 ▲	_____ .00		
24. Other adjustments .....	24. _____ .00	_____ .00		
25. Total adjustments. ADD lines 16-24. ....	25. _____ .00 ▲	_____ .00		
26. <b>NET INCOME.</b> SUBTRACT line 25 from line 15. ....	26. _____ .00 ▲	_____ .00		
<b>STEP 6</b>				
<b>Federal Tax Addition and Deduction</b>				
27. Federal income tax refund / overpayment received in 2011 .....	27. _____ .00 ▲	_____ .00		
28. Self-employment/household employment taxes .....	28. _____ .00 ▲	_____ .00		
29. Addition for federal taxes. ADD lines 27 and 28. ....	29. _____ .00	_____ .00		
30. Total. ADD lines 26 and 29. ....	30. _____ .00	_____ .00		
31. Federal tax withheld .....	31. _____ .00 ▲	_____ .00		
32. Federal estimated tax payments made in 2011 .....	32. _____ .00 ▲	_____ .00		
33. Additional federal tax paid in 2011 for 2010 and prior years .....	33. _____ .00 ▲	_____ .00		
34. Deduction for federal taxes. ADD lines 31, 32, and 33. ....	34. _____ .00	_____ .00		
35. <b>BALANCE.</b> SUBTRACT line 34 from line 30. Enter here and on line 36, side 2. ....	35. _____ .00 ▲	_____ .00		

**NOTE:** Use only blue or black ink, no pencils or red ink.

Enclose W-2s and payment with your return - DO NOT STAPLE them here.



# 2011 IA 1040, page 2

		B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
<b>STEP 7 Taxable Income</b>	36. BALANCE. From side 1, line 35 .....			36. _____	.00 _____ .00
	37. Total itemized deductions from federal Schedule A .....	37. _____	.00 _____	.00 _____	
	Taxpayers with bonus depreciation/section 179 must use Iowa Schedule A.				
	38. Iowa income tax if included in line 5 of federal Schedule A .....	38. _____	.00 _____	.00 _____	
	39. BALANCE. Subtract line 38 from line 37 or enter the amount of itemized deductions from the Iowa Schedule A. ....	39. _____	.00 _____	.00 _____	
	40. Other deductions .....	40. _____	.00 _____	.00 _____	
	41. Deduction. Check one box. <input type="checkbox"/> Itemized. Add lines 39 and 40. <input type="checkbox"/> Standard .....	41. _____	.00 _____	.00 _____	.00 _____
	42. <b>TAXABLE INCOME.</b> SUBTRACT line 41 from line 36. ....	42. _____	.00 _____	.00 _____	.00 _____
<b>STEP 8 Tax, Credits and Checkoff Contributions</b>	43. Tax from tables or alternate tax .....	43. _____	.00 _____	.00 _____	
	44. Iowa lump-sum tax. 25% of federal tax from form 4972 .....	44. _____	.00 _____	.00 _____	
	45. Iowa minimum tax. Attach IA 6251. ....	45. _____	.00 _____	.00 _____	
	46. Total tax. ADD lines 43, 44, and 45. ....	46. _____	.00 _____	.00 _____	.00 _____
	47. Total exemption credit amount(s) from Step 3, side 1 .....	47. _____	.00 _____	.00 _____	
	48. Tuition and textbook credit for dependents K-12 .....	48. _____	.00 _____	.00 _____	
	49. Total credits. ADD lines 47 and 48. ....	49. _____	.00 _____	.00 _____	.00 _____
	50. BALANCE. SUBTRACT line 49 from line 46. If less than zero, enter zero. ....	50. _____	.00 _____	.00 _____	.00 _____
	51. Credit for nonresident or part-year resident. Attach IA 126 and federal return. ....	51. _____	.00 _____	.00 _____	.00 _____
	52. BALANCE. SUBTRACT line 51 from 50. If less than or equal to zero, enter zero. ....	52. _____	.00 _____	.00 _____	.00 _____
	53. Other nonrefundable Iowa credits. Attach IA 148 Tax Credits Schedule. ....	53. _____	.00 _____	.00 _____	.00 _____
	54. BALANCE. SUBTRACT line 53 from line 52. ....	54. _____	.00 _____	.00 _____	.00 _____
	55. School district surtax/EMS surtax. Take percentage from table; multiply by line 54. ....	55. _____	.00 _____	.00 _____	.00 _____
	56. Total Tax. ADD lines 54 and 55. ....	56. _____	.00 _____	.00 _____	.00 _____
	57. Total tax before contributions. ADD columns A & B on line 56 and enter here. ....	57. _____	.00 _____	.00 _____	.00 _____
	58. Contributions. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars. Fish/Wildlife 58a: <input type="checkbox"/> StateFair 58b: <input type="checkbox"/> Firefighters/Veterans 58c: <input type="checkbox"/> Child Abuse Prevention 58d: <input type="checkbox"/> Enter total. ....	58. _____	.00 _____	.00 _____	.00 _____
	59. <b>TOTAL TAX AND CONTRIBUTIONS.</b> ADD lines 57 and 58. ....	59. _____	.00 _____	.00 _____	.00 _____
<b>STEP 9 Credits</b>	60. Iowa income tax withheld .....	60. _____	.00 _____	.00 _____	
	61. Estimated and voucher payments made for tax year 2011 .....	61. _____	.00 _____	.00 _____	
	62. Out-of-state tax credit. Attach IA 130. ....	62. _____	.00 _____	.00 _____	
	63. Motor fuel tax credit. Attach IA 4136. ....	63. _____	.00 _____	.00 _____	
	64. Check One: <input type="checkbox"/> Child and dependent care credit <b>OR</b> <input type="checkbox"/> Early childhood development credit .....	64. _____	.00 _____	.00 _____	.00 _____
	65. Iowa earned income tax credit. See Instructions. ....	65. _____	.00 _____	.00 _____	.00 _____
	66. Other refundable credits. Attach IA 148 Tax Credits Schedule. ....	66. _____	.00 _____	.00 _____	.00 _____
	67. TOTAL. ADD lines 60 - 66. ....	67. _____	.00 _____	.00 _____	.00 _____
	68. <b>TOTAL CREDITS.</b> ADD columns A and B on line 67 and enter here. ....	68. _____	.00 _____	.00 _____	.00 _____
<b>STEP 10 Refund or Amount You Owe</b>	69. If line 68 is more than line 59, SUBTRACT line 59 from line 68. This is the amount you overpaid. ....	69. _____	.00 _____	.00 _____	.00 _____
	70. Amount of line 69 to be <b>REFUNDED</b> ..... REFUND 70. _____	70. _____	.00 _____	.00 _____	.00 _____
	<b>For a faster refund file electronically. Go to <a href="http://www.iowa.gov/tax">www.iowa.gov/tax</a> for details or mail return to Iowa Income Tax - Refund Processing, Hoover State Office Bldg, Des Moines IA 50319-0120</b>				
	71. Amount of line 69 to be <b>applied to your 2012 estimated tax</b> .....	71. _____	.00 _____	.00 _____	.00 _____
	72. If line 68 is less than line 59, SUBTRACT line 68 from line 59. This is the AMOUNT OF TAX YOU OWE. ....	72. _____	.00 _____	.00 _____	.00 _____
	73. Penalty for underpayment of estimated tax from IA 2210 or IA 2210F <input type="checkbox"/> Check if annualized income method is used. ....	73. _____	.00 _____	.00 _____	.00 _____
	74. Penalty and interest ..... 74a. Penalty _____ 74b. Interest _____	74. _____	.00 _____	.00 _____	.00 _____
	75. <b>TOTAL AMOUNT DUE.</b> ADD lines 72, 73, and 74, and enter here. .... <b>PAY THIS AMOUNT</b> 75. _____	75. _____	.00 _____	.00 _____	.00 _____
	<b>You can pay online at <a href="http://www.iowa.gov/tax">www.iowa.gov/tax</a> or pay by mail to Iowa Income Tax - Document Processing, PO Box 9187, Des Moines IA 50306-9187. Make check payable to Treasurer, State of Iowa.</b>				
<b>STEP 11 POLITICAL CHECKOFF.</b> This checkoff does not increase the amount of tax you owe or decrease your refund.	<input type="checkbox"/> \$1.50 to Democratic Party	<input type="checkbox"/> \$1.50 to Democratic Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> \$1.50 to Republican Party	<input type="checkbox"/> \$1.50 to Republican Party	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> \$1.50 to Campaign Fund	<input type="checkbox"/> \$1.50 to Campaign Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>STEP 12</b>	I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.				
<b>PLEASE SIGN HERE</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Signature	Date	Check if Deceased	Date of Death	Preparer's Signature	Date
<b>SIGN HERE</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse's Signature	Date	Check if Deceased	Date of Death	Preparer's SSN, FEIN, or PTIN	

Complete lines 37-40 ONLY if you itemize.



This return is due April 30, 2012. Please sign, enclose W-2s, and verify SSNs. MAILING ADDRESSES: See lines 70 and 75 above.