

40301

9998



Utah State Tax Commission
Utah Individual Income Tax Return
 All state income tax dollars support education,
 children and individuals with disabilities.

2023
TC-40

• Amended Return - enter code: _____ (see instructions)

Full-yr Resident?
Y/N

Your Social Security No.	Your first name	Your last name	
Spouse's Soc. Sec. No.	Spouse's first name	Spouse's last name	
If deceased, complete page 3, Part 1	Address		Telephone number
	City	State ZIP+4	Foreign country (if not U.S.)

1 Filing Status - enter code 1 = Single • 2 = Married filing jointly 3 = Married filing separately 4 = Head of household 5 = Qualifying surviving spouse <small>If using code 2 or 3, enter spouse's name and SSN above</small>	2 Qualifying Dependents a _____ Dependents age 16 and under b _____ Other dependents c _____ Dependents born in 2023 d _____ Total (add lines a, b and c) See instructions.	3 Election Campaign Fund Does not increase your tax or reduce your refund. Enter the code for the party of your choice. <table border="0"> <tr> <td>Yourself</td> <td>Spouse</td> </tr> <tr> <td>• _____</td> <td>• _____</td> </tr> </table> See instructions for code letters or go to incometax.utah.gov/elect . If no contribution, enter N .	Yourself	Spouse	• _____	• _____
Yourself	Spouse					
• _____	• _____					

4	Federal adjusted gross income from federal return	• 4	_____	.00
5	Additions to income from TC-40A, Part 1 (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, Schedule 1, line 1 (if any)	• 7	_____	.00
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	_____	.00
9	Utah taxable income/loss - subtract the sum of lines 7 and 8 from line 6	• 9	_____	.00
10	Utah tax - multiply line 9 by 4.65% (.0465) (not less than zero)	• 10	_____	.00
11	Utah personal exemption (multiply line 2d by \$1,941)	• 11	_____	.00
12	Federal standard or itemized deductions	• 12	_____	.00
13	Add line 11 and line 12	13	_____	.00
14	State income tax included in federal itemized deductions	• 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: \$16,742 (single or married filing separately); \$25,114 (head of household); or \$33,484 (married filing jointly or qualifying surviving spouse)	• 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 in instr.)	• 21	_____	
22	Utah income tax - subtract line 20 from line 10 (not less than zero)	• 22	_____	.00

Electronic filing is quick, easy and free, and will speed up your refund.

To learn more, go to tap.utah.gov

Utah Individual Income Tax Return (continued)

**TC-40
2023**

40302

SSN _____

Last name _____

- 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) • 24 _____ .00
- 25 Full-year resident, subtract line 24 from line 23 (not less than zero) • 25 _____ .00
 Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 41
- 26 Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1) • 26 _____ .00
- 27 Subtract line 26 from line 25 (not less than zero) 27 _____ .00
- 28 Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3) • 28 _____ .00
- 29 AMENDED RETURN ONLY - previous refund • 29 _____ .00
- 30 Recapture of low-income housing credit • 30 _____ .00
- 31 Utah use tax • 31 _____ .00
- 32 **Total tax, use tax and additions to tax** (add lines 27 through 31) 32 _____ .00
- 33 Total withholding - If you have mineral production withholding or pass-through entity withholding, • 33 _____ .00
 complete page 3, Part 5. If not, enter on line 33 the total of TC-40W, Part 1.
- 34 Credit for Utah income taxes prepaid from TC-546 and 2022 refund applied to 2023 • 34 _____ .00
- 35 AMENDED RETURN ONLY - previous payments • 35 _____ .00
- 36 Nonapportionable refundable credits from TC-40A, Part 5 (attach TC-40A, page 2) • 36 _____ .00
- 37 Apportionable refundable credits from TC-40A, Part 6, line c (attach TC-40A, page 2) • 37 _____ .00
- 38 Total withholding and refundable credits - add lines 33 through 37 38 _____ .00
- 39 **TAX DUE** - subtract line 38 from line 32 (not less than zero) • 39 _____ .00
- 40 Penalty and interest (see instructions) 40 _____ .00
- 41 **TOTAL DUE - PAY THIS AMOUNT** - add line 39 and line 40 • 41 _____ .00
- 42 **REFUND** - subtract line 32 from line 38 (not less than zero) • 42 _____ .00
- 43 Voluntary subtractions from refund (not greater than line 42) • 43 _____ .00
 Enter the total from page 3, Part 6
- 44 **REMAINING REFUND DIRECT DEPOSIT** - your account information (see instructions for foreign accounts) checking savings foreign
 • Routing number _____ • Account number _____ Type: • _____ • _____ • _____

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules are true, correct and complete.

SIGN Your signature	Date	Spouse's signature (if filing jointly)	Date
HERE			

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN • _____
Paid Preparer's Section	Preparer's signature	Date	Preparer's PTIN • _____
	Firm's name and address		Preparer's EIN • _____

Attach page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making contributions, want to deposit into a my529 account, want to apply all/part of your refund to next year's taxes, have mineral production or pass-through entity withholding, or no longer qualify for a homeowner's exemption.

Utah Individual Income Tax Return (continued)

TC-40
2023

40303

SSN _____

Last name _____

Part 1 - Deceased Taxpayer Information

If the taxpayer shown on page 1 is deceased, enter the date of death here:

• / /
mm/dd/yy

If the spouse shown on page 1 is deceased, enter the date of death here:

• / /
mm/dd/yy

If you are claiming a refund for a deceased taxpayer and are not the surviving spouse, enter "X":

• _____

You must complete and attach form TC-131 to the return.

Part 2 - Fiscal Year Filer

If filing a fiscal year return (a year other than January 1 through December 31), enter the fiscal year end (mm/yy)

• /
mm/yy

See instructions.

Part 3 - Federal Form 8886 filed

If you filed federal form 8886, *Reportable Transaction Disclosure Statement*, enter "X":

• _____

Get form and instructions at 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 and/or the TC-40 instructions

Sch Dist
Code

	Code	Amount	Sch Dist Code
02 Pamela Atkinson Homeless Account	• _____	_____	.00
03 Kurt Oscarson Children's Organ Transplant Account	• _____	_____	_____
05 School District and Nonprofit School District Foundation - enter school district code	• _____	_____	.00
See instructions for school district codes, or get codes at			
incometax.utah.gov/contributions/school-districts	• _____	_____	.00
15 Clean Air Fund	• _____	_____	_____
16 Governor's Suicide Prevention Fund	• _____	_____	.00

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

_____ .00

Part 5 - Withholding

1. Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1):

• 1 _____ .00

2. Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2):

• 2 _____ .00

3. Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2):

• 3 _____ .00

Total withholding (enter the total here and on TC-40, page 2, line 33):

_____ .00

Part 6 - Voluntary Subtractions from Refund

1. Enter the amount of your refund you want deposited into your **my529 account(s)**:

• 1 _____ .00

See instructions. Also see my529.org, or call 1-800-418-2551.

2. Enter the amount of your refund you want applied to your **2024 taxes**:

• 2 _____ .00

Total voluntary subtractions (enter the total here and on TC-40, page 2, line 43):

_____ .00

May not be greater than the amount on line 42.

Part 7 - Property Owner's Residential Exemption Termination Declaration

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, enter "X" and enter the county code where the residence is located (see instructions or incometax.utah.gov for county codes and additional information).

• _____ Enter "X"

• _____ Enter code

Mail RETURNS WITH PAYMENTS to: Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0266

Mail ALL OTHER RETURNS to: Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0260

Submit page ONLY if data entered.

Attach completed schedule to your Utah Income Tax return.