

# 2013 IA 1040 Iowa Individual Income Tax Form

or fiscal year beginning \_\_\_/\_\_\_/2013 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 ●	E-Mail Address
<b>STEP 2 Filing Status: Mark one box only.</b>		<input type="checkbox"/> Check this box if you or your spouse were 65 or older as of 12/31/13.
1 <input type="checkbox"/> Single: Were you claimed as a dependent on another person's Iowa return? <input type="checkbox"/> YES <input type="checkbox"/> NO▲	Residence on 12/31/13: County No. _____	School District No. _____
2 <input type="checkbox"/> 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> How many have health care coverage?(including Medicaid or hawk-i) _____ How many do not have health care coverage? ● _____	
3 <input type="checkbox"/> Married filing separately on this combined return. Spouse use column B.	SSN: _____ Net Income: \$ _____	
4 <input type="checkbox"/> Married filing separate returns. Spouse's name: _____	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.	
5 <input type="checkbox"/> 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.	SSN: _____	
6 <input type="checkbox"/> 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 = \$ \_\_\_\_\_ ▲ \_\_\_\_\_ X \$ 40 = \$ \_\_\_\_\_

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

**c. Dependents:** Enter 1 for each dependent ..... ▲ \_\_\_\_\_ X \$ 40 = \$ \_\_\_\_\_ ▲ \_\_\_\_\_ 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 Gross Income</b>				
1. Wages, salaries, tips, etc. ....	1. _____ .00	_____ .00		
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		
<b>15. GROSS INCOME. ADD lines 1-14. ....</b>	<b>15. _____ .00 ▲</b>	<b>_____ .00</b>		
<b>STEP 5 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 sales ONLY. See instructions. .	23. _____ .00 ▲	_____ .00		
24. Other adjustments .....	24. _____ .00	_____ .00		
25. Total adjustments. ADD lines 16-24. ....	25. _____ .00 ▲	_____ .00		
<b>26. NET INCOME. SUBTRACT line 25 from line 15. ....</b>	<b>26. _____ .00 ▲</b>	<b>_____ .00</b>		
<b>STEP 6 Federal Tax Addition and Deduction</b>				
27. Federal income tax refund / overpayment received in 2013 .....	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 2013 .....	32. _____ .00 ▲	_____ .00		
33. Additional federal tax paid in 2013 for 2012 and prior years .....	33. _____ .00 ▲	_____ .00		
34. Deduction for federal taxes. ADD lines 31, 32, and 33. ....	34. _____ .00	_____ .00		
<b>35. BALANCE. SUBTRACT line 34 from line 30. Enter here and on line 36, side 2. ....</b>	<b>35. _____ .00 ▲</b>	<b>_____ .00</b>		

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



**STEP 7 Taxable Income**

36. BALANCE. From side 1, line 35 ..... 36. \_\_\_\_\_ .00 \_\_\_\_\_ .00

37. Deduction. Check one box.  Itemized. (include IA Schedule A)  Standard ..... 37. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

38. **TAXABLE INCOME.** SUBTRACT line 37 from line 36. .... 38. \_\_\_\_\_ .00 \_\_\_\_\_ .00

39. Tax from tables or alternate tax ..... 39. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

40. Iowa lump-sum tax. 25% of federal tax from form 4972 ..... 40. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

41. Iowa minimum tax. Attach IA 6251. .... 41. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

42. Total tax. ADD lines 39, 40, and 41. .... 42. \_\_\_\_\_ .00 \_\_\_\_\_ .00

43. Total exemption credit amount(s) from Step 3, side 1. .... 43. \_\_\_\_\_ .00 \_\_\_\_\_ .00

**STEP 8 Tax, Credits and Checkoff Contributions**

44. Tuition and textbook credit for dependents K-12. .... 44. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

45. Volunteer Firefighter/EMS credit. .... 45. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

46. Total credits. ADD lines 43, 44, and 45. .... 46. \_\_\_\_\_ .00 \_\_\_\_\_ .00

47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero. .... 47. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

48. Credit for nonresident or part-year resident. Include IA 126 and federal return. .... 48. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

49. BALANCE. SUBTRACT line 48 from line 47. If less than zero, enter zero. .... 49. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

50. Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule. .... 50. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

51. BALANCE. SUBTRACT line 50 from line 49. If less than zero, enter zero. .... 51. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

52. School district surtax or EMS surtax. Take percentage from table; multiply by line 51. .... 52. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

53. Total tax. ADD lines 51 and 52. .... 53. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

54. TOTAL tax before contributions. Combine columns A and B on line 53 and enter here. .... 54. \_\_\_\_\_ .00

55. Contributions. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.  
 Fish/Wildlife 55a: **▲** \_\_\_\_\_ StateFair 55b: **▲** \_\_\_\_\_ Firefighters/Veterans 55c: **▲** \_\_\_\_\_ Child Abuse Prevention 55d: **▲** \_\_\_\_\_ Enter total. .... 55. \_\_\_\_\_ .00

56. **TOTAL TAX AND CONTRIBUTIONS.** Add line 54 and line 55 and enter here. .... 56. **▲** \_\_\_\_\_ .00

**STEP 9 Credits**

57. Out-of-state tax credit. Include IA 130. .... 57. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

58. Motor fuel tax credit. Include IA 4136. .... 58. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

59. Check One:  Child and dependent care credit **OR**  
 Early childhood development credit ..... 59. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

60. Iowa earned income tax credit. See Instructions. .... 60. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

61. Other refundable credits. Include IA 148 Tax Credits Schedule. 61. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

62. Total refundable credits. ADD lines 57 - 61. .... 62. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

63. Tax after credits. SUBTRACT line 62 from line 53. If less than 0, enter 0. .... 63. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

64. Taxpayers trust fund tax credit. See instructions. .... 64. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

65. Iowa income tax withheld. .... 65. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

66. Estimated and voucher payments made for tax year 2013 ..... 66. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

67. TOTAL. ADD lines 62, 64, 65, and 66. .... 67. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

68. **TOTAL CREDITS.** ADD columns A and B on line 67 and enter here. .... 68. \_\_\_\_\_ .00

69. If line 68 is more than line 56, SUBTRACT line 56 from line 68. This is the amount you overpaid. .... 69. **▲** \_\_\_\_\_ .00

**STEP 10 Refund or Amount You Owe**

70. Amount of line 69 to be **REFUNDED** ..... REFUND 70. **▲** \_\_\_\_\_ .00  
**For a faster refund file electronically. Go to www.iowa.gov/tax for details**

71. Amount of line 69 to be **applied to your 2014 estimated tax**.....71. \_\_\_\_\_ .00 **▲** \_\_\_\_\_ .00

72. If line 68 is less than line 56, SUBTRACT line 68 from line 56. This is the AMOUNT OF TAX YOU OWE. .... 72. **▲** \_\_\_\_\_ .00

73. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F  Check if annualized income method is used. 73. **▲** \_\_\_\_\_ .00

74. Penalty and interest ..... 74a. Penalty \_\_\_\_\_ .00 **▲** 74b. Interest \_\_\_\_\_ .00 **▲** ADD Enter total 74. \_\_\_\_\_ .00

75. **TOTAL AMOUNT DUE.** ADD lines 72, 73, and 74, and enter here. .... PAY THIS AMOUNT 75. **▲** \_\_\_\_\_ .00  
**You can pay online at www.iowa.gov/tax. Mailing address: Iowa Income Tax - Document Processing, PO Box 9187, Des Moines IA 50306-9187. Make check payable to Treasurer, State of Iowa.**

**STEP 11 POLITICAL CHECKOFF.** This checkoff does not increase the amount of tax you owe or decrease your refund.

**▲ SPOUSE:**  \$1.50 to Democratic Party  \$1.50 to Republican Party  \$1.50 to Campaign Fund

**▲ YOURSELF:**  \$1.50 to Democratic Party  \$1.50 to Republican Party  \$1.50 to Campaign Fund

**STEP 12 PLEASE** 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.

**SIGN HERE** Your Signature \_\_\_\_\_ Date \_\_\_\_\_  Check if Deceased \_\_\_\_\_ Date of Death \_\_\_\_\_ Preparer's Signature \_\_\_\_\_ Date \_\_\_\_\_

**SIGN HERE** Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_  Check if Deceased \_\_\_\_\_ Date of Death \_\_\_\_\_ Preparer's PTIN \_\_\_\_\_ Firm's FEIN \_\_\_\_\_

Daytime Telephone Number \_\_\_\_\_ Daytime Telephone Number \_\_\_\_\_



This return is due April 30, 2014. Please sign, enclose W-2s, and verify SSNs.  
**MAILING ADDRESS:** See line 75 above.