

# 2016 IA 1040 Iowa Individual Income Tax Return

For fiscal year beginning 2016 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 •	Email Address:
<b>Step 2 Filing Status: Mark one box only.</b>		Check this box if you or your spouse was 65 or older as of 12/31/16. <input type="checkbox"/> •
1 <input type="checkbox"/>	Single: Were you claimed as a dependent on another person's Iowa return? Yes <input type="checkbox"/> No <input type="checkbox"/> ▲	Residence on 12/31/16: 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.	
4 <input type="checkbox"/>	Married filing separate returns. Spouse's name: _____ ▲ SSN: _____ Net Income: \$ _____	
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.	
6 <input type="checkbox"/>	Qualifying Widow(er) with dependent child. Name: _____ SSN: _____	

<b>Step 3 Exemptions</b>		B. Spouse (Filing Status 3 ONLY)	A. You or Joint
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 \$ _____	e. Total \$ _____

<b>Step 4 Reportable Social Security Benefits as calculated on line 11 of Iowa social security worksheet</b>	B. Spouse/Status 3 ▲	A. You or Joint ▲
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	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
<b>Step 5 Gross Income</b>				
1. Wages, salaries, tips, etc.....	1. _____	_____	_____	_____
2. Taxable interest income. If more than \$1,500, complete Sch. B.....	2. _____	_____	_____	_____
3. Ordinary dividend income. If more than \$1,500, complete Sch. B.....	3. _____	_____	_____	_____
4. Alimony received.....	4. _____	_____	_____	_____
5. Business income/(loss) from federal Schedule C or C-EZ.....	5. _____	_____	_____	_____
6. Capital gain/(loss), federal Sch. D if required for federal purposes.....	6. _____	_____	_____	_____
7. Other gains/(losses) from federal form 4797.....	7. _____	_____	_____	_____
8. Taxable IRA distributions.....	8. _____	_____	_____	_____
9. Taxable pensions and annuities.....	9. _____	_____	_____	_____
10. Rents, royalties, partnerships, estates, etc.....	10. _____	_____	_____	_____
11. Farm income/(loss) from federal Schedule F.....	11. _____	_____	_____	_____
12. Unemployment compensation. See instructions.....	12. _____	_____	_____	_____
13. Gambling winnings.....	13. _____	_____	_____	_____
14. Other income, bonus depreciation, and section 179 adjustment.....	14. _____	_____	_____	_____
15. Gross Income. Add lines 1-14.....	15. _____	_____	_____	_____

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

<b>Step 6 Adjustments to Income</b>				
16. Payments to an IRA, Keogh, or SEP.....	16. _____	_____	_____	_____
17. Deductible part of self-employment tax.....	17. _____	_____	_____	_____
18. Health insurance deduction.....	18. _____	_____	_____	_____
19. Penalty on early withdrawal of savings.....	19. _____	_____	_____	_____
20. Alimony paid.....	20. _____	_____	_____	_____
21. Pension/retirement income exclusion.....	21. _____	▲ _____	_____	_____
22. Moving expense deduction from federal form 3903.....	22. _____	_____	_____	_____
23. Iowa capital gain deduction; certain sales only. Include IA 100.....	23. _____	▲ _____	_____	_____
24. Other adjustments.....	24. _____	_____	_____	_____
25. Total adjustments. Add lines 16-24.....	25. _____	_____	_____	_____
26. Net Income. Subtract line 25 from line 15.....	26. _____	_____	_____	_____

<b>Step 7 Federal Tax Addition and Deduction</b>				
27. Federal income tax refund/overpayment received in 2016.....	27. _____	▲ _____	_____	_____
28. Self-employment/household employment/other federal taxes.....	28. _____	▲ _____	_____	_____
29. Addition for federal taxes. Add lines 27 and 28.....	29. _____	_____	_____	_____
30. Total. Add lines 26 and 29.....	30. _____	_____	_____	_____
31. Federal tax withheld.....	31. _____	▲ _____	_____	_____
32. Federal estimated tax payments made in 2016.....	32. _____	▲ _____	_____	_____
33. Additional federal tax paid in 2016 for 2015 and prior years.....	33. _____	▲ _____	_____	_____
34. Deduction for federal taxes. Add lines 31, 32, and 33.....	34. _____	_____	_____	_____
35. Balance. Subtract line 34 from line 30. Enter here and on line 36, page 2.....	35. _____	_____	_____	_____



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		B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
<b>Step 8 Taxable Income</b>	36. BALANCE. From side 1, line 35.....			36. _____	.00
	37. Deduction. Check one box <input type="checkbox"/> Itemized.(Include IA Schedule A) <input type="checkbox"/> Standard <input type="checkbox"/>			37. _____	.00 ▲
	38. TAXABLE INCOME. SUBTRACT line 37 from line 36 .....			38. _____	.00
<b>Step 9 Tax, Credits, and Check-off Contributions</b>	39. Tax from tables or alternate tax .....			39. _____	.00 ▲
	40. Iowa lump-sum tax. 25% of federal tax from form 4972 .....			40. _____	.00 ▲
	41. Iowa alternative minimum tax. Include IA 6251. ....			41. _____	.00 ▲
	42. Total tax. ADD lines 39, 40, and 41. ....			42. _____	.00
	43. Total exemption credit amount(s) from Step 3, side 1. ....			43. _____	.00
	44. Tuition and textbook credit for dependents K-12. ....			44. _____	.00 ▲
	45. Volunteer firefighter/EMS/reserve peace officer credit. ....			45. _____	.00 ▲
	46. Total credits. ADD lines 43, 44, and 45. ....			46. _____	.00
	47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero. ....			47. _____	.00 ▲
	48. Credit for nonresident or part-year resident. Include IA 126 and federal return. ....			48. _____	.00 ▲
	49. BALANCE. SUBTRACT line 48 from 47. If less than zero, enter zero. ....			49. _____	.00 ▲
	50. Out-of-state tax credit. Include IA 130. ....			50. _____	.00 ▲
	51. BALANCE. SUBTRACT line 50 from 49. If less than zero, enter zero. ....			51. _____	.00
	52. Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule. ....			52. _____	.00 ▲
	53. BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero. ....			53. _____	.00 ▲
	54. School district surtax or EMS surtax. Take percentage from table; multiply by line 53. ....			54. _____	.00 ▲
	55. Total state and local tax. ADD lines 53 and 54. ....			55. _____	.00 ▲
	56. TOTAL state and local tax before contributions. Combine columns A and B on line 55 and enter here. ....			56. _____	.00
	57. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.				
	Fish/Wildlife 57a: ▲ _____ State Fair 57b: ▲ _____ Firefighters/Veterans 57c: ▲ _____ Child abuse Prevention 57d: ▲ _____ Enter here.....			57. _____	.00
	58. TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here.....			58. _____	.00 ▲
<b>Step 10 Credits</b>	59. Iowa Fuel tax credit. Include IA 4136.....			59. _____	.00 ▲
	60. Check One: Child and dependent care credit <input type="checkbox"/> OR <input type="checkbox"/>				
	▲ Early childhood development credit <input type="checkbox"/>			60. _____	.00 ▲
	61. Iowa earned income tax credit. 15.0% (.15) of federal credit .....			61. _____	.00 ▲
	62. Other refundable credits. Include IA 148 Tax Credits Schedule.....			62. _____	.00 ▲
	63. Total refundable Iowa credits. ADD lines 59 - 62. ....			63. _____	.00 ▲
	64. RESERVED FOR FUTURE USE .....	0		64. _____	.00 ▲
	65. Taxpayers trust fund tax credit. The credit for 2016 is \$0.....	0		65. _____	.00 ▲
	66. Iowa income tax withheld. ....			66. _____	.00 ▲
	67. Estimated and voucher payments made for tax year 2016. ....			67. _____	.00 ▲
	68. TOTAL. ADD lines 63, 65, 66, and 67.....			68. _____	.00 ▲
	69. TOTAL CREDITS. ADD columns A and B on line 68 and enter here .....			69. _____	.00
<b>Step 11 Refund or Amount Due</b>	70. If line 69 is more than line 58, Subtract line 58 from line 69. This is the amount you overpaid. ....			70. _____	.00 ▲
	71. Amount of line 70 to be REFUNDED. ....			REFUND 71. _____	.00 ▲
	For a faster refund file electronically. Go to <a href="https://tax.iowa.gov">https://tax.iowa.gov</a> for details				
	72. Amount of line 70 to be applied to your 2017 estimated tax.....			72. _____	.00 ▲
	73. If line 69 is less than line 58, Subtract line 69 from line 58. This is the AMOUNT OF TAX YOU OWE .....			73. _____	.00 ▲
	74. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F. Check if annualized income method is used. ▲ <input type="checkbox"/>			74. _____	.00 ▲
	75. Penalty and interest ▲ 75a. Penalty _____ .00 ▲ 75b. Interest _____ .00 ADD. Enter total.....			75. _____	.00
	76. TOTAL AMOUNT DUE. ADD lines 73, 74, and 75. Enter here.....			PAY THIS AMOUNT 76. _____	.00 ▲

<b>Step 12</b>	Political Checkoff - This checkoff does not increase the amount of tax you owe or decrease your refund.	▲ Spouse	<input type="checkbox"/> \$1.50 to Republican Party <input type="checkbox"/> \$1.50 to Democratic Party <input type="checkbox"/> \$1.50 to Campaign Fund	▲ Yourself	<input type="checkbox"/> \$1.50 to Republican Party <input type="checkbox"/> \$1.50 to Democratic Party <input type="checkbox"/> \$1.50 to Campaign Fund
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**Step 13** 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>SIGN HERE</b>	Your Signature	Date	▲ <input type="checkbox"/>	Check if Deceased	Date of Death	Preparer's Signature	Date
<b>SIGN HERE</b>	Spouse's Signature	Date	▲ <input type="checkbox"/>	Check if Deceased	Date of Death	Preparer's PTIN	Firm's FEIN
	Daytime Telephone Number					Daytime Telephone Number	

**This return is due May 1, 2017. Please sign, enclose W-2s, and verify SSNs. You can pay online at <https://tax.iowa.gov> Make check payable to Treasurer, State of Iowa. MAILING ADDRESS: Iowa Income Tax Document Processing, PO BOX 9187, Des Moines IA 50306-9187.**

