

2012 IA 1040 Iowa Individual Income Tax Form

or fiscal year beginning ___/___/2012 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

STEP 2 Filing Status: Mark one box only.

1 Single: Were you claimed as a dependent on another person's Iowa return? YES NO▲

2 Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)

3 Married filing separately on this combined return. Spouse use column B.

4 Married filing separate returns. Spouse's name:

SSN:

▲Net Income: \$

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.

6 Qualifying widow(er) with dependent child.

Name:

SSN:

● Check this box if you or your spouse were 65 or older as of 12/31/12.

Residence on 12/31/12: County No. ●

School District No. ●

Dependent children for whom an exemption is claimed in Step 3

How many have health care coverage?(including Medicaid or *hawk-i*)

How many do not have health care coverage? ● ●

STEP 3 Exemptions

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 person who is **65 or older** and/or 1 for each person 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 \$

\$

STEP 4 Gross Income

	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
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		
15. GROSS INCOME. ADD lines 1-14.	15. .00 ▲	.00		

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

STEP 5 Adjustments to Income

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		
26. NET INCOME. SUBTRACT line 25 from line 15.	26. .00 ▲	.00		

STEP 6 Federal Tax Addition and Deduction

27. Federal income tax refund / overpayment received in 2012	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 2012	32. .00 ▲	.00		
33. Additional federal tax paid in 2012 for 2011 and prior years	33. .00 ▲	.00		
34. Deduction for federal taxes. ADD lines 31, 32, and 33.	34. .00	.00		
35. BALANCE. SUBTRACT line 34 from line 30. Enter here and on line 36, side 2.	35. .00 ▲	.00		

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	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
STEP 7 Taxable Income				
36. BALANCE. From side 1, line 35	36. ....	.00	.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	39. ....	.00	.00	
amount of itemized deductions from the Iowa Schedule A.				
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. TAXABLE INCOME. SUBTRACT line 41 from line 36.	42. ....	.00	.00	.00
STEP 8 Tax, Credits and Checkoff Contribu- tions				
43. Tax from tables or alternate tax	43. ....	.00	.00	.00
44. Iowa lump-sum tax. 25% of federal tax from form 4972	44. ....	.00	.00	.00
45. Iowa minimum tax. Attach IA 6251.	45. ....	.00	.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	.00
48. Tuition and textbook credit for dependents K-12	48. ....	.00	.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. TOTAL TAX AND CONTRIBUTIONS. ADD lines 57 and 58.	59. ....	.00	.00	.00
STEP 9 Credits				
60. Iowa income tax withheld	60. ....	.00	.00	.00
61. Estimated and voucher payments made for tax year 2012	61. ....	.00	.00	.00
62. Out-of-state tax credit. Attach IA 130.	62. ....	.00	.00	.00
63. Motor fuel tax credit. Attach IA 4136.	63. ....	.00	.00	.00
64. Check One: <input type="checkbox"/> Child and dependent care credit OR <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. TOTAL CREDITS. ADD columns A and B on line 67 and enter here.	68. ....	.00	.00	.00
STEP 10 Refund or Amount You Owe				
69. If line 68 is more than line 59, SUBTRACT line 59 from line 68. This is the amount you overpaid.	69. <input type="checkbox"/>	.00	.00	.00
70. Amount of line 69 to be REFUNDED REFUND 70. <input type="checkbox"/>	70. <input type="checkbox"/>	.00	.00	.00
For a faster refund file electronically. Go to www.iowa.gov/tax for details or mail return to Iowa Income Tax - Refund Processing, Hoover State Office Bldg, Des Moines IA 50319-0120				
71. Amount of line 69 to be applied to your 2013 estimated tax 71.	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. <input type="checkbox"/>	.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. <input type="checkbox"/>	.00	.00	.00
74. Penalty and interest 74a. Penalty 74b. Interest <input type="checkbox"/> ADD Enter total 74.	74. ....	.00	.00	.00
75. TOTAL AMOUNT DUE. ADD lines 72, 73, and 74, and enter here. PAY THIS AMOUNT 75. <input type="checkbox"/>	75. <input type="checkbox"/>	.00	.00	.00
You can pay online at www.iowa.gov/tax 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.				
STEP 11 POLITICAL CHECKOFF. This checkoff does not increase the amount of tax you owe or decrease your refund.	<input type="checkbox"/> \$1.50 to Republican Party	<input type="checkbox"/> \$1.50 to Republican Party	<input type="checkbox"/>	
<input type="checkbox"/> SPOUSE: <input type="checkbox"/> \$1.50 to Democratic Party	<input type="checkbox"/> YOURSELF: <input type="checkbox"/> \$1.50 to Democratic Party	<input type="checkbox"/>		
<input type="checkbox"/> \$1.50 to Campaign Fund	<input type="checkbox"/> \$1.50 to Campaign Fund	<input type="checkbox"/>		
STEP 12 PLEASE SIGN HERE	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	Preparer's Signature	Date
SIGN HERE	Spouse's Signature	Date	Preparer's PTIN	Firm's FEIN
			Daytime Telephone Number	Daytime Telephone Number

Complete lines 37-40
ONLY if you itemize.

This return is due April 30, 2013. Please sign, enclose W-2s, and verify SSNs.
MAILING ADDRESSES: See lines 70 and 75 above.