

Federal Electronic Filing Instructions

Tax Year 2018

You are responsible for confirming the status of your electronically filed return. You can confirm the status of your return by going to <https://www.taxact.com/ef/efile-center>. You will need to enter the primary social security number and last name on the return along with your ZIP code.

Self Select PIN: You do not need to mail any paper signature forms to the IRS. Your return has been successfully filed once you receive your acceptance from the IRS.

Refund:

You have elected to receive your refund of \$982 via direct deposit.

You can start checking the status of your refund within 24 hours of e-filing at the IRS website <https://www.irs.gov/Refunds> under Where's My Refund. The IRS issues most refunds in less than 21 days. Updates to refund status are made once daily - usually at night.

Filing status: ☒ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)

Your first name and initial

keith w

Last name

fitzgerald

Your social security number

185-68-0797

Your standard deduction: ☐ Someone can claim you as a dependent ☐ You were born before January 2, 1954 ☐ You are blind

If joint return, spouse's first name and initial

Last name

Spouse's social security number

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Spouse was born before January 2, 1954 ☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

☒ Full-year health care coverage or exempt (see inst.)

Home address (number and street). If you have a P.O. box, see instructions.

424 N Center St

Apt. no.

111

Presidential Election Campaign (see inst.)

☐ You ☐ Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6.

Salt Lake City, UT 84103

If more than four dependents, see inst. and check here ☐

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) check if qualifies for (see inst.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.

Your signature

Spouse's signature. If a joint return, both must sign.

Date

Date

Your occupation

Spouse's occupation

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Paid Preparers Use Only

Preparer's name

Preparer's signature

PTIN

Firm's EIN

Firm's name

Firm's address

Phone no.

Check if:

☐ 3rd Party Designee

☐ Self-employed

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

UYA

Form 1040 (2018)

UYA

2018 Utah Electronic Filing Instructions

These instructions are provided to help you understand and complete the final steps for electronically filing your Utah return. We HIGHLY recommend you print these instructions for your reference.

You are responsible for confirming the status of your electronically filed Utah return. You can confirm the status of your return by going to <https://www.taxact.com/ef/efile-center>. You will need to enter the Primary Social Security Number and Last Name on the return along with the Zip Code.

Utah Form TC-40:

You should print and keep Form TC-40, wage and tax statements, and accompanying forms and schedules for a period of at least three years from the due date of the return. **Do not mail Form TC-40 to the Utah State Tax Commission.**

You have elected to receive your refund of \$194 via direct deposit.

Where's my Utah refund?

The Tax Commission cannot issue refunds before March 1st if it cannot verify your W-2s with your employers. Due to our efforts to protect your identity, please allow 120 days from the date you filed your return or March 1, whichever is later, to process your return and refund request. Use the "Where's My Refund" tool to track the status of your refund, <http://incometax.utah.gov/refunds/wheres-my-refund>

40801

1064

Utah State Tax Commission
Utah Individual Income Tax Return
 All State Income Tax Dollars Fund Education

2018
TC-40

• Amended Return - enter code: (see instructions)

Full-yr Resident?

Your Social Security No.

185680797

Your first name

KEITH W

Your last name

FITZGERALD

Y/N

Y

Spouse's Soc. Sec. No.

Spouse's first name

Spouse's last name

N

Address

424 N CENTER ST APT 111

Telephone number

7173096306

If deceased, complete
page 3, Part 1

City

SALT LAKE CITY

State

UT

ZIP + 4

84103

Foreign country (if not U.S.)

1 Filing Status - enter code

1 = Single

• **1** 2 = Married filing jointly

3 = Married filing separately

4 = Head of household

5 = Qualifying widow(er)

If using code 2 or 3, enter spouse's name and SSN above

2 Qualifying Dependents

a Dependents age 16 and under

b Other dependents

c Total (add lines a and b)

Dependents must be claimed for the child tax credit on your federal return. See instructions.

3 Election Campaign Fund

Does not increase your tax or reduce your refund.

Enter the code for the party of your choice. Yourself Spouse
 • **N** •

See instructions for code letters or go to incometax.utah.gov/elect.

If no contribution, enter **N**.

4	Federal adjusted gross income from federal return	• 4	54483.
5	Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)	• 5	
6	Total income - add line 4 and line 5	6	54483.
7	State tax refund included on federal form 1040, Schedule 1, line 10 (if any)	• 7	
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	
9	Utah taxable income (loss) - subtract the sum of lines 7 and 8 from line 6	• 9	54483.
10	Utah tax - multiply line 9 by 4.95% (.0495) (not less than zero)	• 10	2697.
11	Utah personal exemption (multiply line 2c by \$565)	• 11	
12	Federal standard or itemized deductions	• 12	12000.
13	Add line 11 and line 12	13	12000.
14	State income tax deducted on federal Schedule A, line 5a (if any)	• 14	
15	Subtract line 14 from line 13	15	12000.
16	Initial credit before phase-out - multiply line 15 by 6% (.06)	• 16	720.
17	Enter: \$14,256 (if single or married filing separately); \$21,384 (if head of household); or \$28,512 (if married filing jointly or qualifying widower)	• 17	14256.
18	Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	40227.
19	Phase-out amount - multiply line 18 by 1.3% (.013)	• 19	523.
20	Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)	• 20	197.
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	2500.

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

**To learn more,
go to
tap.utah.gov**

23 Enter tax from TC-40, page 1, line 22	23	2500.
24 Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)	• 24	
25 Full-year resident, subtract line 24 from line 23 (not less than zero)	• 25	2500.
Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 37		
26 Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)	• 26	
27 Subtract line 26 from line 25 (not less than zero)	27	2500.
28 Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)	• 28	
29 AMENDED RETURN ONLY - previous refund	• 29	
30 Recapture of low-income housing credit	• 30	
31 Utah use tax	• 31	
32 Total tax, use tax and additions to tax (add lines 27 through 31)	32	2500.
33 Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1)	• 33	2694.
34 Credit for Utah income taxes prepaid from TC-546 and 2017 refund applied to 2018	• 34	
35 Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2)	• 35	
36 Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2)	• 36	
37 AMENDED RETURN ONLY - previous payments	• 37	
38 Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)	• 38	
39 Total withholding and refundable credits - add lines 33 through 38	39	2694.
40 TAX DUE - subtract line 39 from line 32 (not less than zero)	• 40	
41 Penalty and interest (see instructions)	41	
42 TOTAL DUE - PAY THIS AMOUNT - add line 40 and line 41	• 42	
43 REFUND - subtract line 32 from line 39 (not less than zero)	• 43	194.
44 Voluntary subtractions from refund (not greater than line 43)	• 44	
Enter the total from page 3, Part 5		
45 DIRECT DEPOSIT YOUR REMAINING REFUND - provide account information (see instructions for foreign accounts)		
• Routing number 324377516	• Account number 746024288300	Account type: • <input checked="" type="checkbox"/> checking • <input type="checkbox"/> savings

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
 HERE

Date
04/13/19

Spouse's signature (if filing jointly)

Date

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN • 0
Paid Preparer's Section	Preparer's signature	Date	Preparer's PTIN •
	Firm's name and address		Preparer's EIN •

Attach TC-40 page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, want to deposit into a my529 account, want to apply all/part of your refund to next year's taxes, want to direct deposit to a foreign account, or no longer qualify for a homeowner's exemption.

Line Explanations	IMPORTANT
1 Employer/payer ID number from W-2 box "b" or 1099 2 Utah withholding ID number from W-2 box "15" or 1099 (14 characters, ending in WTH, no hyphens) 3 Employer/payer name and address from W-2 box "c" or 1099 4 Enter "X" if reporting Utah withholding from form 1099 5 Employee's Social Security number from W-2 box "a" or 1099 6 Utah wages or income from W-2 box "16" or 1099 7 Utah withholding tax from W-2 box "17" or 1099	Do not send your W-2s or 1099s with your return. Instead enter W-2 or 1099 information below, but only if there is Utah withholding on the form. Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax. Enter mineral production withholding from TC-675R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.
First W-2 or 1099 1 870659954 2 11923803004WTH (14 characters, no hyphens) 3 BACKCOUNTRY COM 1678 W REDSTONE CTR DR PARK CITY UT 84098 4 5 185680797 6 14283. 7 699.	Second W-2 or 1099 1 330993064 2 11832835004WTH (14 characters, no hyphens) 3 IBOATS INC 960 WEST LEVOY DR S#100 TAYLORSVILLE UT 84123 4 5 185680797 6 40201. 7 1995.
Third W-2 or 1099 1 2 (14 characters, no hyphens) 3 4 5 6 7	Fourth W-2 or 1099 1 2 (14 characters, no hyphens) 3 4 5 6 7

Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33:

2694.

Submit page ONLY if data entered.
Attach completed schedule to your Utah Income Tax Return.
Do not attach W-2s or 1099s to your Utah return.