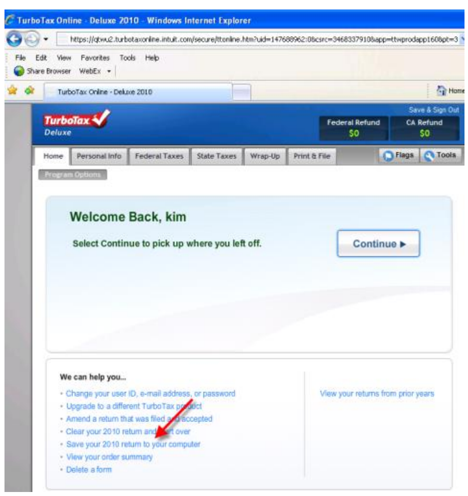
# Federal 1040 Amend Instructions:

**If you used TurboTax Online to prepare and file your original return, follow these steps. If you used TurboTax Desktop, skip down to “Desktop Customer Start Here!”**

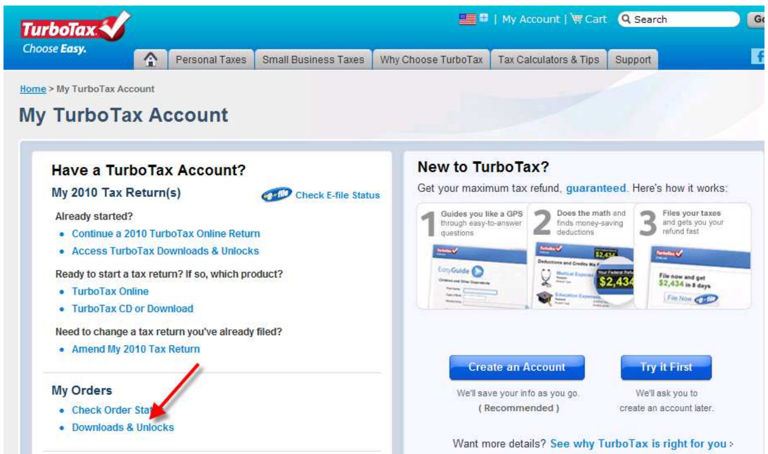
1. **Save Your TurboTax Online 2010 return to your computer:**
    a. Sign in to TurboTax Online and open your tax return


    b. On the Home tab, click **Save your 2010 return to your computer**.

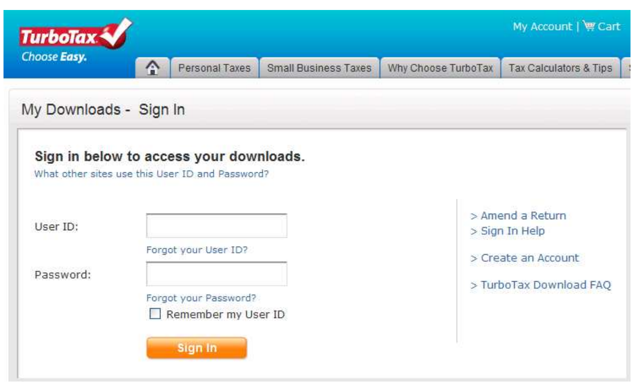



    c. Save your return to your computer’s hard drive, preferably in the **My Documents** folder for Windows or the **Documents** folder for Mac. The file is saved with a **.tax2010** filename extension.
    d. Click on **Save & Sign Out** in the upper right corner of screen
2. **Download the TurboTax Desktop version**
    a. Call the phone number on your email and request a download of the desktop version
    b. Go to http://turbotax.intuit.com/ and click on **My Account**

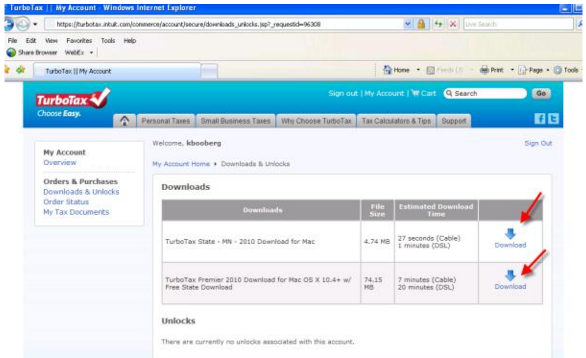

**c.** Click on the **Downloads and Unlocks**




d. Sign in using your User ID and Password.




e. Click on the **Downloads** that are available




f. Click the **Sign Out** in the upper right hand corner of the screen

## Desktop Customers Start Here!

3. **Open Your Tax File in Desktop**
   a. Open your desktop TurboTax product
   b. On the 1st screen select **Find a Tax File**


   c. Go to the folder or location where you saved the **.tax2010** file
   d. Select the **.tax2010** file, and then select **Open**
   e. From the **File** menu, choose **Save**

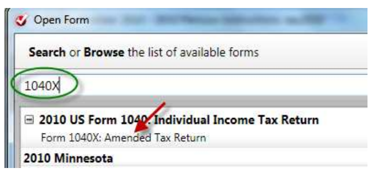
**All customers (TurboTax Online and Desktop) follow these steps to begin to amend your federal return:**

1. Open your 2010 TurboTax return
2. Click on the **Personal Info** tab

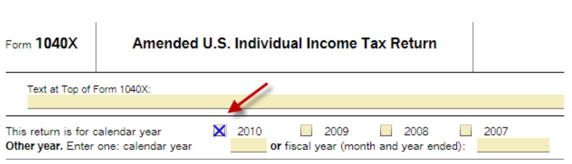

3. Select **Forms**


4. Click on **Open Form**

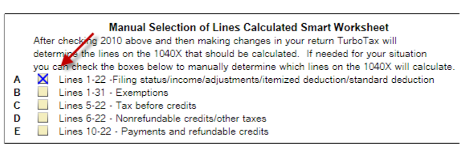

5. In the *type a form name* box, enter **1040X and** double click on **Form 1040X:Amended Tax Return**




6. On the Form 1040X, check the box for **2010.**

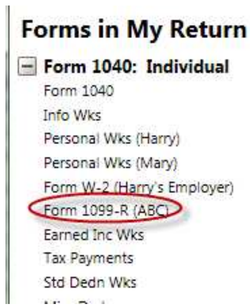



7. Scroll down to “Manual Selection of Lines Calculated Smart Worksheet.
**Check box A** for Line 1-22

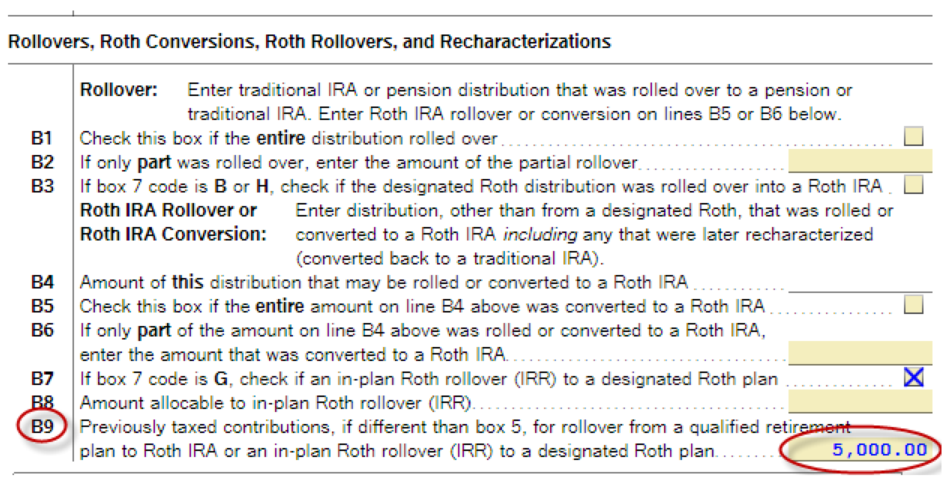



**Now it’s time to handle verify/change the “after tax contributions” on your 1099-R that had your Pension rollover to a Roth account.**

1. Scroll down **the Forms in My Return** list ( left hand side of the screen.)
2. Click on the **1099-R** that meets the criteria in the email that you received. See example:




3. Scroll down the "**Distributions from Pensions, IRAs, etc"** screen to **Rollovers, Roth Conversions, Roth Rollovers, and Recharacterization"** section.
4. **Review the amount on line B9.**



**Rollovers, Roth Conversions, Roth Rollovers, and Recharacterizations**

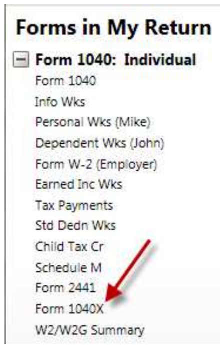
**Rollover:** Enter traditional IRA or pension distribution that was rolled over to a pension or traditional IRA. Enter Roth IRA rollover or conversion on lines B5 or B6 below.

| | | |
|---|---|---|
| **B1** | Check this box if the **entire** distribution rolled over | ☐ |
| **B2** | If only **part** was rolled over, enter the amount of the partial rollover | |
| **B3** | If box 7 code is **B** or **H**, check if the designated Roth distribution was rolled over into a Roth IRA | ☐ |
| | **Roth IRA Rollover or Roth IRA Conversion:** Enter distribution, other than from a designated Roth, that was rolled or converted to a Roth IRA *including* any that were later recharacterized (converted back to a traditional IRA). | |
| **B4** | Amount of **this** distribution that may be rolled or converted to a Roth IRA | |
| **B5** | Check this box if the **entire** amount on line B4 above was converted to a Roth IRA | ☐ |
| **B6** | If only **part** of the amount on line B4 above was rolled or converted to a Roth IRA, enter the amount that was converted to a Roth IRA | |
| **B7** | If box 7 code is **G**, check if an in-plan Roth rollover (IRR) to a designated Roth plan | ☒ |
| **B8** | Amount allocable to in-plan Roth rollover (IRR) | |
| **B9** | Previously taxed contributions, if different than box 5, for rollover from a qualified retirement plan to Roth IRA or an in-plan Roth rollover (IRR) to a designated Roth plan | 5,000.00 |

5. The amount on **line B9** should be the amount of the **"after-tax" contribution** that you made to the pension account that was rolled over/converted to a Roth IRA account.
6. **If the amount on Line B9 is correct**, **YOU DO NOT NEED TO AMEND YOUR TAX RETURN.**
7. **If the amount on Line B9 is NOT correct**, **change it to the correct amount** and following the rest of these instructions to amend your tax return.

**Let's finish the Form 1040X.**

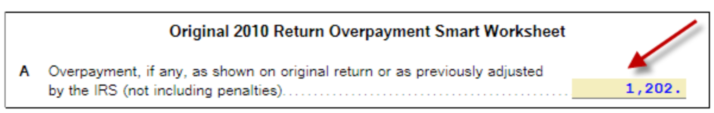
1. Scroll down under **Forms in My Return** and click on **Form 1040X.**




2. Scroll down the **Form 1040X** to the **Original 2010 Return Payments Smart Worksheet**, enter these amounts :

| Line: | Description: | Enter from original return: |
|---|---|---|
| **A** | **Total amount paid with extension** | **Form 1040, line 68** |
| **B** | **Tax Paid with original return** | **Form 1040, line 76 less line 77 or the amount you paid, if different** |
| **C** | **Additional tax paid after return was filed** | **Amount you paid after filing the return (not with the return).** |

3. In the Original **2010 Return Overpayment Smart Worksheet**, enter any overpayment amount on the original return, **Form 1040, line 73.**

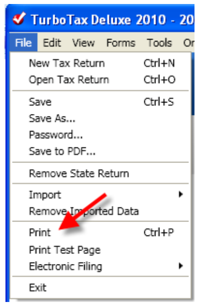



4. Scroll down page 2, **Part III, Explanation of Changes** section
   a. **Enter this wording:** "The original federal tax return incorrectly included the nontaxable portion of the pension distribution conversion to a Roth IRA account. This amended return includes the correct taxable amount."

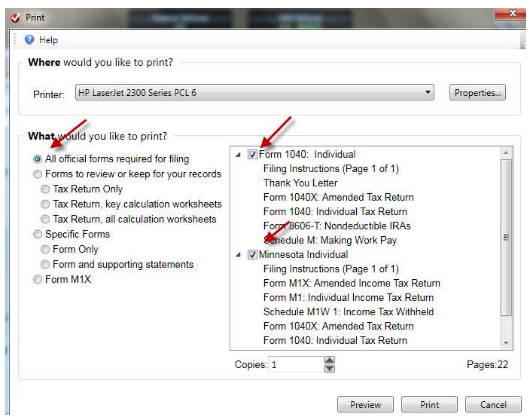
**NOTE: If your state return is impacted, please return to the TurboTax support article to download the state amend instructions.**

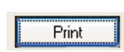
**Now it's time to print and mail your amended return. Follow these steps:**

1) On the toolbar, click on **File** and then **Print**




2) Choose **All official forms required for filing**
3) Check the box for **Form 1040: Individual**
4) If you are also amending a state return, check the box for that state.




5) Click **Print** button 

6) The forms to mail will print.
7) The instructions will indicate any balance due that you need to pay or refund that you will receive. It will also include the address to mail the return.
8) Be sure to print out an extra copy to keep for your files.